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COHENMOHR LLP

AWARD/CONTRACT

Rating	Page of Pages
	1 86

1. THIS CONTRACT IS A RATED ORDER UNDER (15 CFR 350)

2. CONTRACT (Proc. Inst. Ident.) NO. 50PAPT201025

3. EFFECTIVE DATE 07/03/2002

4. REQUISITION/PURCHASE REQUEST PROJECT NO. PROC0100232

5. ISSUED BY CODE 17
Office of Procurement
U.S. Patent and Trademark Office
2011 Crystal Drive, Suite 810
Arlington, VA 22202

6. ADMINISTERED BY (if other than Item 5) CODE

7. NAME AND ADDRESS OF CONTRACTOR (No., street, city, county, State and ZIP Code)
Trawick and Associates
6900 Wisconsin Avenue
Suite 400
Bethesda, MD 20815

8. DELIVERY FOB Origin Other (See below)

9. DISCOUNT FOR PROMPT PAYMENT
10 days %
20 days %
30 days %
days %

10. SUBMIT INVOICES (4 Copies unless other - as specified) To The ADDRESS SHOWN BY ITEM 12

11. SHIP TO/MARK FOR CODE
No Shipping Information

12. PAYMENT WILL BE MADE BY CODE
Office of Finance -
U.S. Patent & Trademark Office
2011 Crystal Drive, Suite 802
Arlington, VA 22202

13. AUTHORITY FOR USING OTHER THAN FULL AND OPEN COMPETITION:
 10 U.S.C. 2304(c) () 41 U.S.C. 253(c) ()

14. ACCOUNTING AND APPROPRIATION DATA
- - A - - - - -

15A. ITEM NO.	15B. SUPPLIES/SERVICES	15C. QUANTITY	15D. UNIT	15E. UNIT PRICE	15F. AMOUNT
	SEE LINE ITEM DETAIL				

15G. TOTAL AMOUNT OF CONTRACT 0.00

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CONTRACTING OFFICER WILL COMPLETE ITEM 17 OR 18 AS APPLICABLE

17. CONTRACTOR'S NEGOTIATED AGREEMENT (Contractor is required to sign this document and return _____ copies to issuing office)
Contractor agrees to furnish and deliver all items or perform all the services set forth or otherwise identified above and on any continuation sheets for the consideration stated herein. The rights and obligations of the parties to this contract shall be subject to and governed by the following documents: (a) this award/contract, (b) the solicitation, if any, and (c) such provisions, representations, certifications, and specifications, as attached or incorporated by reference herein.
(Attachments are listed herein.)

18. AWARD (Contractor is not required to sign this document) Your offer on Solicitation Number 52PAPT101017 including the additions or changes made by you which additions or changes are set forth in full above, is hereby accepted as to the items listed above and on any continuation sheets. This award consummates the contract which consists of the following documents: (a) the Government's solicitation and your offer, and (b) this award/contract. No further contractual document is necessary.

19A. NAME AND TITLE OF SIGNER (Type or print) Carol Trawick, CEO

20A. NAME OF CONTRACTING OFFICER Kate Kuderman

19B. NAME OF CONTRACTOR [Signature]

19C. DATE SIGNED 7-03-02

20B. UNITED STATES OF AMERICA [Signature]

20C. DATE SIGNED 07/03/2002

Line Item Summary

Document Number
50PAPT201025

Title
FMEUS2

Page
2 of 56

Total Funding: \$0.00

FYs Fund Budget Org Sub Object Class Sub Program Cost Org Sub Proj/Job No. Sub Reporting Category

Revision Closed FYs Cancelled Fund

Line Item Number	Description	(Start Date to End Date)	Quantity	Unit of Issue	Unit Price	Total Cost (Includes Discounts)
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This contract is for Facilities Management and End-User Support Services (FMEUS2).

Total Cost: \$0.00

**Contract Level
Funding Summary**

Document Number
SOPAPT201025

Title
FMEUS2

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\$0.00

Reference Requisition; PROC0100232

Total Funding: \$0.00

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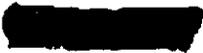
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50PAPT201025

FMEUS2

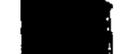
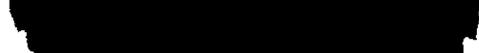
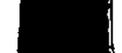
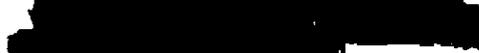
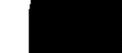
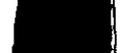
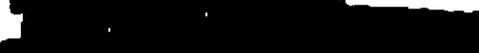
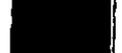
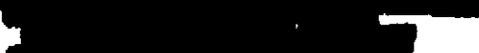
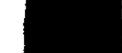
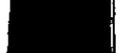
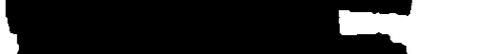
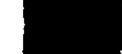
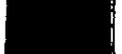
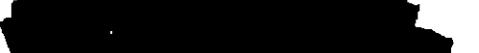
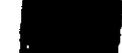
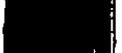
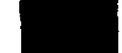
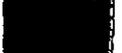
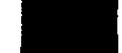
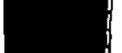
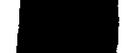
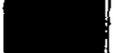
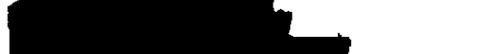
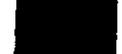
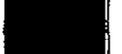
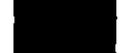
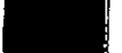
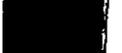
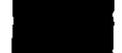
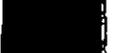
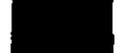
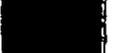
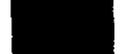
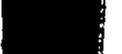
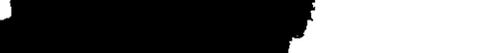
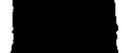
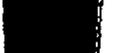
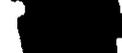
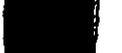
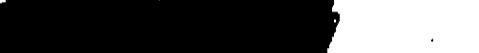
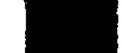
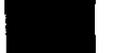
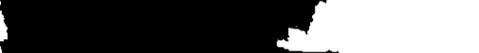
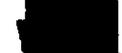
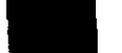
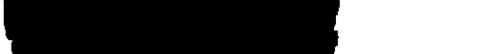
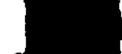
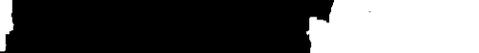
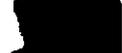
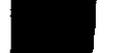
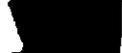
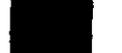
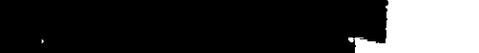
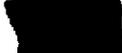
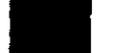
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Other Direct Costs/Year 
Including Rent, Utilities and Maintenance

B.2 OPTION PERIOD 1

Option Period 1: July 3, 2003 - July 2, 2004

Labor Category	On-Site (Furniture)	On-Site (w/o Furniture)	Off-Site
	\$ 	\$ 	\$ 
	\$ 	\$ 	\$ 
	\$ 	\$ 	\$ 
	\$ 	\$ 	\$ 
	\$ 	\$ 	\$ 
	\$ 	\$ 	\$ 
	\$ 	\$ 	\$ 
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[REDACTED]	\$ [REDACTED]	\$ [REDACTED]	\$ [REDACTED]	\$ [REDACTED]	\$ [REDACTED]	\$ [REDACTED]	\$ [REDACTED]	\$ [REDACTED]
Other Direct Costs/Year Including Rent, Utilities and Maintenance	\$ [REDACTED]							

B.8 OPTION PERIOD 7

Option Period 7: July 3, 2009 - July 2, 2010

Labor Category	On-Site (Furniture)	On-Site (w/o Furniture)	Off-Site
[REDACTED]	\$ [REDACTED]	\$ [REDACTED]	\$ [REDACTED]

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SECTION C -- DESCRIPTIONS AND SPECIFICATIONS

C.1 DESCRIPTION/SPECIFICATIONS/WORK STATEMENT

Facilities Maintenance and End User Support
Performance Based Service Contracting
Statement of Work

SECTION C - DESCRIPTION/SPECIFICATIONS/WORK STATEMENT

C.1 Purpose

The intent of this contract is to obtain comprehensive Information Technology (IT) services. The services to be provided are: network operations; help desk support; comprehensive management and end-user support of hardware and all microcomputer-related software; asset management; and UNIX and NT operating system support. At its option the United States Patent and Trademark Office (USPTO) may require support for the future relocation of its Information Technology (IT) assets to its new facility in Alexandria, VA.

C.2. Definitions

Deployment - Generally a deployment is defined, for the purposes of this requirement, as the issuance, installation or replacement of any desktop, peripheral or component moved, delivered or installed into service by the Contractor. These components shall be fully functional and configured in accordance with the current standards of the agency (this includes loading and testing all mandatory and optional software). If replacing a desktop, peripheral or component, replacement must be equivalent or of better performance. If the customer has data files, documents, or other files on defective desktop hardware, the Contractor shall ensure that such files (when not damaged) are transferred to the replacement computer.

Franconia Warehouse - The location of the Franconia Warehouse is 6808 Loisdale Road, Springfield, VA. The telephone numbers are (703) 924-6058 and (703) 924-9382. The point of contacts are Duane Davis and Nick Massillon.

Fullerton Center - (Newington Warehouse) - The location of the Fullerton Center is 7401 Fullerton Road, Springfield, VA. The telephone number is (703) 644-1700. The point of contact is Jerry Hill.

Patent Data Capture Contractor - The location of the Patent Data Capture (PDC) Contractor is 3443 Carlyn Springs Road, Falls Church, VA 22041. The telephone number is (703) 750-9580. The point of contact is Bill Docca.

Patent and Trademark Depository Library Depot Support - The Contractor shall pack and ship replacement hardware to the Patent and Trademark Depository Library (PTDL) so that it will arrive within five (5) working days of the receipt of the problem ticket. The Contractor shall include any necessary information regarding replacement hardware and instructions for the PTDL to pack and ship back the broken hardware. The Contractor shall be responsible for packing, shipping (including charges) and tracking the equipment.

C.3 Background

The USPTO, an organization with an employee base of approximately 7,000, has a requirement for facilities management and end user support. The mission of the USPTO is to administer the laws and regulations related to patents and trademarks in order to promote industrial and technical progress in the United States and strengthen the national economy. The USPTO carries out its mission by examining patent and trademark applications, issuing patents and registering trademarks, disseminating patent and trademark information to the public, and by encouraging a domestic and international climate in which intellectual property can flourish.

The USPTO is operating under a congressional mandate to implement state-of-the-art computer data and information retrieval systems in support of virtually all aspects of its operations. In support of its mission the USPTO is responsible for the accessibility, accuracy, and integrity of more than 40 million patent, patent related documents, and trademarks. Each year approximately 300,000 patent applications and 375,000 trademark applications are processed. These application filings are expected to increase by approximately ten percent (10%) per year.

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The USPTO is supported by an information technology (IT) infrastructure foundation of hardware, system software, and network communications that have been deployed in support of the mission of the USPTO. The IT infrastructure provides access to application systems and office automation tools used in the performance of the work processes. The USPTO's highest level of management has placed an extremely high priority on providing consistent, available, and reliable network and data processing services. Also inherent in this process is providing for the expansion of services and capabilities.

The automated systems currently in use are complex in scope and far-reaching in application, both within and outside the USPTO. Successful operation is largely dependent upon the collective efforts of a staff of diverse technical specialists able to quickly respond to the many variables and conditions that accompany efforts of this proportion. It is neither practical nor cost-effective, however, to fully staff all of these specialties in-house on a permanent basis because the need may be intermittent. For additional information regarding USPTO automated systems and IT Infrastructure please see <http://www.uspto.gov/wcb/offices/ac/comp/proc/acquisitions/oamref.htm>.

C.4 Description, Current Environment, and Requirements

The Contractor shall provide solutions that meet or exceed the current environment, requirements and performance standards described in the sections below. This SOW is organized in the following manner: the Universal Contractual Requirements (§C.4.1) are general requirements which apply to all IT support services required under this contract (Advanced Problem Resolution; Data Maintenance support; DeskTop Field Support; Help Desk support; Network Operations; UNIX and NT Operating system support; Database Administration; User ID and Password Administration; Technical Writing; Warehouse support; Hardware Maintenance and Inventory support). The Universal Contractual Requirements also contain performance measures which the USPTO expects the contractor to meet or exceed unless specified otherwise under the individual IT support areas. In addition to the Universal Contractual Requirements, the SOW describes in detail discrete IT support areas covered by this contract. All IT support areas are introduced by a general Description, followed by a Current Environment, which is a detailed description of the environment and performance measures which presently exist here at USPTO, and lastly, there is a Requirements section, which provides specific requirements applicable to the IT support services area. In addition to the Universal Contractual Requirements, the Contractor shall provide solutions that meet or exceed the Current Environments of the discrete IT support areas, the specific Requirements and performance measures described therein.

C.4.1 Universal Contractual Requirements - Description:

C.4.1.1 This section describes requirements, which apply to all areas of IT support services, which follow.

C.4.2 Universal Contractual Requirements - Current Environment:

C.4.2.1 The Contractor ensures that all users are notified, as appropriate, of the release of system changes at least five (5) and also one (1) business day prior to installation.

C.4.2.2 Currently the Contractor responds to ninety-five percent (95%) of problems within two (2) hours of receipt of problem ticket. A response is defined as speaking to the customer, leaving a voice mail message for the customer, sending an email message to the customer or leaving a work service form at the customer's site. Currently, the Contractor resolves or circumvents ninety-five percent (95%) of problems within four (4) hours of receipt of problem ticket. These commitments apply to all problems assigned to the Contractor, unless otherwise stipulated in a Service Commitment, Task Order (TO), or Service Level Agreement (SLA).

C.4.2.3 If the Contractor performs a site visit and the customer is available prior to leaving the site, the contractor confirms with the customer its satisfaction with the work performed. This confirmation is captured by the act of the customer signing and dating the work service form. Regardless if the customer is available during a site visit or not, the contractor always leaves a work service form with the customer. This work service form is accurate, legible and includes at a minimum the following information:

- a. An explanation of work performed during the site visit;
- b. A place where the customer can confirm the visit was satisfactory, a problem/change record number if applicable;
- c. The contractor individual(s) name who made the site visit; and;
- d. The contractor's phone number and a POC in the event there are any questions the customer needs answered after the contractor leaves the site.

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One copy of the form is left with the customer, and one is kept in the Contractor's records. The Contractor does not close or resolve any records without obtaining confirmation from the customer that the service has been performed or the problem has been resolved. However, an exception is made if three (3) attempts to contact a customer over a three (3) day period do not produce a response from the customer.

C.4.2.4 Currently the contractor logs approximately 112,000 Enterprise-Wide Asset Management System (EAMS) records per year.

C.4.2.5 The Contractor maintains a minimum 95% customer satisfaction rating at all times. This translates to Contractor receiving no more than 5% "re-opened" and "unsatisfactory" ratings. Ratings will be measured through the Customer Quality Check process. The rating levels given during the quality checks are: outstanding, very good, satisfactory, unsatisfactory and re-open.

C.4.3 Universal Contractual Requirements - Requirements:

C.4.3.1 The Contractor shall provide resources with expertise in the latest technologies employed by the USPTO, shall furnish all necessary personnel, material, equipment, services and facilities (except as otherwise provided) necessary to perform all of the requirements in the statement of work.

C.4.3.2 The Contractor shall provide technical assistance in developing, maintaining, and storing of all Task Manager Directives, Service Commitments, Service Level Agreements (SLA), Operational Support Plans (OSP), Standard Operating Procedures (SOP) and Technical Notes established by the USPTO.

C.4.3.3 The Contractor shall abide by all Task Manager Directives, Service Commitments, Service Level Agreements (SLA), Operational Support Plans (OSP), Standard Operating Procedures (SOP) and Technical Notes established by the USPTO.

C.4.3.4 The Contractor shall not make any changes, modifications, alterations, or enhancements to the USPTO's infrastructure, hardware, or software without detailed change records being approved by the USPTO.

C.4.3.5 The Contractor shall create a service request record in a USPTO provided tracking system for all calls received from customers or problems identified by the Contractor. The Contractor shall assign the call, as appropriate, for resolution and/or action. The Contractor shall thoroughly document all work they perform in the appropriate problem/change record after each new status or within two (2) hours of performing the work, whichever comes first.

C.4.3.6 Unless otherwise noted in a specific requirement, the Contractor shall provide support to the USPTO from 6:00 a.m. to 6:00 p.m., Monday through Friday. Unless specifically specified, all times are Eastern Time and the USPTO requires service on all Federal holidays except those observed by the USPTO. The only holidays that the USPTO observes and the agency is closed for are Thanksgiving, Christmas, and New Year's Day.

C.4.3.7 The Contractor shall use the mobile (Psion) units, provided by the USPTO, to record all changes for asset management purposes and to document all field service work performed.

C.4.3.8 Any equipment, peripheral or component moved, delivered, or installed into service by the Contractor shall be fully functional and at a performance level equivalent to equipment removed for repair. Replacement equipment shall have supported software loaded, configured, and all peripherals attached. If the customer has data files, documents, or other files on the defective desktop hardware, the Contractor shall ensure that such files (when not damaged) are transferred to the replacement computer.

C.4.3.9 The Contractor shall, on a daily basis, participate in technical evaluations of proposed new hardware, software, and networking technologies at the USPTO. The Contractor shall work with the USPTO to certify the serviceability and maintainability of network technologies introduced.

C.4.3.10 The Contractor shall perform a Root Cause Analysis (RCA), for problems that it resolves, when requested.

C.4.3.11 The Contractor shall be responsible for the receipt and tracking of all hardware shipped to the Contractor's facility on behalf of the USPTO, utilizing the USPTO inventory tracking system.

C.4.3.12 The Contractor shall be responsible for requests to lockdown USPTO hardware. Any equipment, peripheral or component moved, delivered or installed into service by the Contractor shall be locked down as required.

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C.4.3.13 The Contractor shall review daily asset management activities (deployments, excess, moves, etc.) reports to ensure the proper use of the inventory system. Any discrepancies found must be corrected with three (3) business days.

C.4.3.14 The Contractor shall provide support to the warehouses in both Franconia and Newington (please see definitions for further information). This on-location support shall include all of the Personal Computers and peripherals (connected to PTONet and to the Federal Records Center via modems) and PALM/TRAM equipment (connected to the A16 via modems). Support shall be for the hardware, software and PTONet.

C.4.3.15 The Contractor shall provide support including PTONet support, Monday through Friday, from 7:00 a.m. to 4:00 p.m., for the PDC Contractor location in Falls Church, VA (please see definitions for further information). The Contractor shall provide remote support to the PDC Contractor locations in Pennsylvania, which includes all of the Personal Computers and peripherals, and PALM equipment. Contractor shall provide support Monday through Friday, from 7:30 a.m. to 11:30 p.m., Saturday and Sunday from 7:30 a.m. to 5 p.m. Contractor shall notify Search and Information Resources (SIRA) of any problems.

C.4.3.16 The USPTO requires that all Electronic Information Technology (EIT), as that term is defined at FAR §2.101, delivered under the contract comply with the applicable EIT technology accessibility standards issued by the Architectural and Transportation Barriers Compliance Board set forth at 36 CFR part 1194. The applicable standards are available at <http://www.access-board.gov/news/508-final.htm>.

C.4.4 Advance Problem Resolution Support - Description (current staffing level - 17):

C.4.4.1. Serves as an advanced level of support for resolving desktop problems. This support includes analysis and trouble-shooting problems to determine possible trends, recommendation of corrective action, and documentation of trouble-shooting procedures for the Help Desk to follow for recurring problems.

C.4.5 Advanced Problem Resolution Support - Current Environment:

C.4.5.1 The current Contractor staff is composed of Microsoft Certified Systems Engineers. These staff members also possess a background in systems programming, network engineering, or security administration.

C.4.5.2 The Contractor follows-up on any problems where OCIO has failed to meet its service level commitments by one (1) day or more. This follow-up includes, but is not necessarily limited to, the following:

- a. Contacting the problem assignee to confirm that the assignee is aware of the problem.
- b. Contacting other groups or individuals, as called for in the OSP, to work on aspects of the problem.
- c. Providing trouble-shooting assistance, including at the customer site, when directed to do so by the Task Managers.

d. Notifying the Task Managers when a service level commitment has been missed.

e. Assisting in problem recovery when directed to do so by the Task Managers.

f. Updating the Task Managers, as new information becomes available, on the status of the problems.

g. Ensuring that the Help Desk or the problem assignee is notifying the customer of any progress in resolving the

problem.

h. Ensuring that within one (1) hour of the problem being resolved, either the Help Desk or the problem assignee has notified the customer.

i. Notifying the Task Managers, within two (2) hours of receipt, of any problems that will require a RCA.

j. Notifying the Task Managers, within one (1) day of problem resolution or circumvention, of problems that may be application system deficiencies.

k. Updating and documenting trouble-shooting procedures that the Help Desk should follow if similar problems occur in the future.

C.4.5.3 The Contractor reviews all draft OSP for accuracy and completeness. The Contractor provides its written comments within five (5) working days of receiving a plan.

C.4.5.4 The Contractor is currently responsible for verifying the continued accuracy and completeness of all existing Operational Support Plans at least once every nine (9) months.

C.4.5.5 The Contractor analyzes new problem records daily for possible trends. The types of trends that are often identified may include unanticipated problems caused by the implementation of a change and problems that are reported by individual customers

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but actually impact multiple customers (examples: line outage, router failure). Once identified, the Contractor provides the Task Managers with written notice of these trends within one (1) hour.

C.4.5.6 The current Contractor's support services include those services listed below. Normally all are completed within five (5) hours of receiving a request:

- a. Verification of current baseline/cost center[s] prior to testing;
- b. Reloading of the appropriate baseline/cost center[s] prior to testing;
- c. Coordination of SMS push packages to the appropriate workstations;
- d. Verification and/or reissuing of test user account[s] and password[s];
- e. Verification of proper network configuration, connections and profiles for the applicable cost-center network servers[s]; and/or
- f. Coordination with help desk (and others, as required) of Information Technology Testing Division (ITTD) hardware and/or software problem resolution [s].

C.4.5.7 Currently the USPTO has approximately one hundred and twenty (120) employees that participate in the Work-at-Home program. This number is likely to increase during the life of the contract.

C.4.5.8 The Contractor responds to ninety-five percent (95%) of service requests within one (1) business day of receipt of service ticket.

C.4.5.9 The Contractor completes ninety-five percent (95%) of service requests for fewer than ten (10) desktop upgrades or installs within five (5) business days of receipt of service ticket with the exception of local software installs which is completed within two (2) business days. The Contractor negotiates with the COTR of service requests for more than ten (10) desktop upgrades or installs within three (3) business days of receipt of service ticket and complete service request within the timeslot agreed upon.

C.4.6 Advanced Problem Resolution Support - Requirements:

C.4.6.1 The Contractor shall provide technical assistance and expertise in the Knowledge Pak software; guide the development of standards and naming conventions for the USPTO Knowledge Paks and document the same.

C.4.6.2 The Contractor shall provide technical support to Work at Home participants.

C.4.6.3 The Contractor shall provide technical support for all USPTO operated systems.

C.4.7 Data Maintenance Support - Description (current staffing level - 11):

C.4.7.1 Provides support to the USPTO patent and trademark databases through timely and accurate loading and updating of a diverse number of databases.

C.4.8 Data Maintenance Support - Current Environment:

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C.4.8.1 Currently the Contractor loads the following:

- a. Weekly Issue Patent Image Data - five (5) days a week, eight (8) hours per day.
- b. Trademark application and registration cropped images - five (5) days a week, one (1) hour per day.
- c. Weekly Issue Patent Image Data from Tagged Image File Format (TIFF) - weekly.
- d. Weekly Issue Application Image Data - five (5) days a week, eight (8) hours per day.
- e. Weekly Issue Application Image Data from TIFF - weekly.
- f. Foreign Patent Image Data for both the European and Japan Patent Offices (EPO/JPO) - seven (7) days a week, twenty-four (24) hours per day.
- g. Non-patent literature data - five (5) days a week, eight (8) hours per day.
- h. Patent data (USPAT, USOCR, EPO, JPO and Derwent data) - five (5) days a week, eight (8) hours per day.
- i. Global Patent Information data "front page data" - five (5) days a week, one (1) hour per day.

C.4.8.2 Currently the Contractor monitors, troubleshoots, and provides the following:

- a. Trademark daily Bibliographic Research Service (BRS) - Update process - five (5) days a week, three (3) hours per day.
- b. Data File Delivery (DFD) Update process - weekly.

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- c. Software problems, investigates errors that may be causing software problems, corrects all support software problems that occur in the load processes and verifies the operability of all load systems after corrections have been completed.
- d. Patent(s) and application(s) that fail to process successfully through the text BRS data load process and provide recovery of the text load due to failures.
- e. Patent(s) and application(s) that fail to process successfully through the Patent Image Retrieval System (PIRS) image load process and provides recovery of image load due to failures.
- f. Weekly Issue Text and Image Load.
- g. Ad hoc requests for analysis, special load processing, production assistance, and file load support in exigent situations.
- h. Performing, maintaining and tracking the back-ups of all text and image data that is successfully loaded.
- i. Programming support to load/reload patent(s) and application(s).

C.4.8.3 Corrections are made in the shortest time possible in order to resume any load that is in a "Wait State" due to software problems. This support is provided seven (7) days a week, twenty-four (24) hours per day.

C.4.9 Data Maintenance Support - Requirements:

C.4.9.1 The Contractor shall load the following:

- a. Weekly Issue Patent Image Data - five (5) days a week, eight (8) hours per day.
- b. Trademark application and registration cropped images - five (5) days a week, one (1) hour per day.
- c. Weekly Issue Patent Image Data from TIFF - weekly.
- d. Weekly Issue Application Image Data - five (5) days a week, eight (8) hours per day.
- e. Weekly Issue Application Image Data from TIFF - weekly.
- f. Foreign Patent Image Data for both the EPO and JPO - seven (7) days a week, twenty-four (24) hours per day.
- g. Non-patent literature data - five (5) days a week, eight (8) hours per day.
- h. Patent data (USPAT, USOCR, EPO, JPO and Derwent data) - five (5) days a week, eight (8) hours per day.
- i. Global Patent Information data "front page data" - five (5) days a week, one (1) hour per day.

C.4.9.2 The Contractor shall monitor, troubleshoot, and provide the following:

- a. Trademark daily BRS-Update process - five (5) days a week, three (3) hours per day.
- b. DFD Update process - weekly.
- c. Software problems, investigates errors that may be causing software problems, corrects all support software problems that occur in the load processes and verifies the operability of all load systems after corrections have been completed.
- d. Patent(s) and application(s) that fail to process successfully through the text BRS data load process and provide recovery of the text load due to failures.
- e. Patent(s) and application(s) that fail to process successfully through the PIRS image load process and provides recovery of image load due to failures.
- f. Weekly Issue Text and Image Load.
- g. Ad hoc requests for analysis, special load processing, production assistance, and file load support in exigent situations.
- h. Performing, maintaining and tracking the back-ups of all text and image data that is successfully loaded.
- i. Programming support to load/reload patent(s) and application(s).

C.4.9.3 The Contractor shall ensure corrections are made in the shortest time possible in order to resume any load that is in a "Wait State" due to software problems. This support is provided seven (7) days a week, twenty-four (24) hours per day.

C.4.10 Desktop Field Support - Description (current staffing level - 70):

C.4.10.1 Supports the USPTO desktop lifecycle from installation and configuration, move and deployment, maintenance, repair, upgrade, and surplus. The term desktop includes but is not limited to:

- a. USPTO approved desktop CPU's, approved and non-approved laptop CPU's/docking stations, barcode readers (BCR) and accompanying peripherals which include desktop and network printers, scanners, keyboards, monitors, scan guns, etc.
- b. USPTO approved desktop workstation operating systems; USPTO approved desktop COTS software and desktop AJS.
- c. PROMARK group printers with Windows NT Server 4.0 printer servers, Walk-up NT 4.0 workstations that utilize an additional local account and NT policies.

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Also included are the desktop move and surplus support requirements of miscellaneous USPTO hardware, for example, scanners, modems, LAN probes, routers, hubs, stand-alone servers, DVD towers, jukeboxes, fax machines and convenience copiers (copiers not connected to a desktop).

C.4.11 Desktop Field Support - Current Environment:

C.4.11.1 Whenever working on equipment, the Contractor uses a grounding strap to protect the equipment from Electrostatic Discharge (ESD) damage. The grounding strap should conform to the American National Standards Institute (ANSI) standards in regard to EOS/ESD Grounding.

C.4.11.2 The Contractor currently provides its "best effort" support to non-USPTO approved laptop CPU's/docking stations. For hardware related problems, the laptop/docking station may be sent out to a third-party vendor for repair, if laptop operating system and/or drivers requested by customer are not available or not compatible, then the Contractor shall provide an alternative recommendation to customer.

C.4.11.3 During installations the Contractor removes the old PC from the customer location and retains customer's old PC for five (5) business days.

C.4.11.4 Currently the Contractor is able to perform thirty-five (35) PC installations per day, Monday through Friday.

C.4.11.5 The Contractor currently commits a four (4) hour timeslot with customer to complete an installation.

C.4.11.6 The current Contractor performs twenty-two (22) data back up and user configurations of PCs and baselines the twenty-two (22) PCs by COB the day prior to installation day (all cost centers will have Ghost images so that only optional applications will be installed via the USPTO SW Distribution Servers (e.g. WinInstall).

C.4.11.7 Currently the Contractor dedicates two technical/customer service follow up staff members that visit each user who had a PC replacement the previous day. Their responsibility is to check on how the replacement process went, answer any questions, provide information and fix any lingering problems.

C.4.11.8 Currently the Contractor resolves and circumvents group printer paper, paper jam and toner problems within one (1) hour of being notified of a problem. Notification is generally issued as a problem ticket or by an automated printer monitoring system.

C.4.11.9 Currently the Contractor maintains desktop hardware spare equipment including the most current desktop and laptop CPU's at inventory levels that ensure problems may be circumvented/resolved within four (4) hours.

C.4.11.10 Currently the Contractor performs a total of six (6) daily checks of individual group printers. These six (6) checks must be at least two (2) hours apart. The morning check shall take place at or before 7:30 a.m. and the afternoon check shall take place no later than 7:00 p.m. On weekends and holidays, the Contractor checks each printer two (2) times between the hours of 8 a.m. and 2 p.m. A check consists of:

- Printing a test print from the Walk Up Workstation.
- Clearing jams that occur.
- Completely filling paper tray if necessary.
- Adding toner as necessary.
- Removing trash and clutter as appropriate.
- Completely, accurately and legibly filling out Group Printer log sheet.

C.4.11.11 Currently the support for hardware storage areas consists of the following:

- a. Tracking all hardware as it enters and leaves the storage area.
- b. Testing all hardware as it arrives in the storage area and labeling the hardware with a brief description of any problems identified during testing.
- c. Performing the quarterly asset certification.
- d. Labeling, boxing, and shelving, speakers, cables, keyboards, and small peripherals.
- e. Serving as the point-of-contact for any storage room hardware that needs to be deployed or surplus.
- f. Removing reusable parts from surplus PCs.
- g. Arranging for the surplus of the PCs.

C.4.11.12 The Contractor completes requests to move/surplus ten (10) or fewer desktop hardware units within one (1) day of receipt of request. Exceptions may be made if customer requests a later, specific move/surplus date.

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C.4.11.13 The Contractor completes requests to move/surplus more than ten (10) desktop hardware units within five (5) days of receipt of the request.

C.4.11.14 The Contractor schedules a four (4) hour timeslot with the customer of a move/surplus. This is to inform the customer as to the window of time when they should expect the Contractor to begin and complete the move/surplus.

C.4.12 Desktop Field Support - Requirements:

C.4.12.1 The Contractor shall provide support from 5:30 a.m. to 12:00 a.m. (midnight), Monday through Friday, and from 5:30 a.m. to 10:00 p.m., Saturday, Sunday and holidays.

C.4.12.2 The Contractor shall be responsible for monitoring, troubleshooting, and resolving all operational, hardware, and software problems associated with Promark Group Printers, NT Group Printer Servers and walk-up workstations. The Contractor shall assist with new installation of Group Printers. The Contractor shall add paper, add toner, and clear paper jams for group printers as appropriate. The Contractor shall obtain paper and toner from central repositories currently provided by the USPTO.

C.4.12.3 The Contractor shall be responsible for NT Group Printer System Administration functions.

C.4.12.4 The Contractor shall provide depot support for PTDL workstations requiring replacement within six (6) hours.

C.4.12.5 The Contractor shall support all hardware storage areas Monday through Friday, from 8:00 a.m. to 5:00 p.m.

C.4.13 Help Desk: Electronic Business Support (EBS) - Description (current staffing level - 9):

C.4.13.1 Serves as the primary point of contact for public customers reporting problems or asking questions related to the application systems available on the USPTO web site (www.uspto.gov). The EBS Help Desk ensures that all calls are handled promptly, courteously, and are resolved or sent to the proper service provider within the established timeframe.

C.4.14 Help Desk - Electronic Business Support (EBS) - Current Environment:

C.4.14.1 Currently the Contractor's Technical Service Specialists answers electronic business services incoming calls placed to (800) 786-9199 or (703) 308-4357 up to approximately seventy-five (75) calls and emails per day. They maintain an average speed of answering a call of one (1) minute or less and returning emails within one (1) day of receipt.

C.4.14.2 The Contractor thoroughly documents all work they perform in the appropriate problem/service/change record. The Contractor updates the record within fifteen (15) minutes of performing the work.

C.4.15 Help Desk - Electronic Business Support (EBS) - Requirements:

C.4.15.1 The Contractor shall provide support from 6:00 p.m. to 6:00 a.m., Monday through Friday. The Contractor shall provide twenty-four (24) hour coverage on weekends and holidays.

C.4.16 OCIO Information Technology Help Desk - Description (current staffing level - 35):

C.4.16.1 Serves as the single point of contact for reporting problems with or requesting services to supported hardware and software.

C.4.17 OCIO Information Technology Help Desk - Current Environment:

C.4.17.1 The Contractor returns voice mail messages within thirty (30) minutes and e-mail messages within two (2) hours. The Contractor completes updating of records within fifteen (15) minutes of handling customer calls, voice mails, and emails.

C.4.17.2 The Contractor maintains a daily average answer speed of one (1) minute or less when the weekday call volume is five hundred (500) calls or less. The following average weekday answer speeds will apply to call volumes above five hundred (500):

Number of Calls
501-550

Expected Daily Answer Speed (Minutes)
1.5

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551-600	2
601-650	3
651-700	4
701-800	6
801-900	9
901-1000	12
1000+	no set expectations

C.4.18 OCIO Information Technology Help Desk- Requirements:

C.4.18.1 The Contractor shall answer all incoming calls placed to or transferred to the main help desk number (Currently 703-305-9000).

C.4.18.2 The Contractor shall provide personnel to support the helpdesk from 5:30 a.m. to 12:00 a.m. (midnight), Monday through Friday and from 5:30 a.m. to 10:00 p.m. local time, Saturday, Sunday, and holidays.

C.4.18.3 By 5:30 a.m., Monday through Friday, the Contractor shall review all records/tickets created in the previous twenty-four (24) hours. Contractor shall ensure that all the records are properly assigned and contain all appropriate information. Contractor shall make appropriate corrections and take appropriate action to escalate problems that extend beyond service level commitments.

C.4.18.4 The Contractor shall issue Critical Problem Notices (CPNs) in accordance with USPTO procedures within fifteen (15) minutes of notification of major production outages or a major loss of functionality to multiple customers. CPNs must be updated and issued according to standard USPTO procedures. Contractors must use the information in the CPN as a basis for updating the System Status Page on the Web site.

C.4.19 Network Operations - Description (current staffing level - 35):

C.4.19.1 PTONet currently provides connectivity to over ten thousand (10,000) nodes, spread across eighteen (18) buildings in Crystal City as well as provides several wide-area network (WAN) links, or external connections, supporting the following activities:

- a. Internet connectivity;
- b. Contractors supporting USPTO;
- c. Connectivity to commercial AIS;
- d. PTONet services to employees working at home or on travel;
- e. PTONet services to FTDLs; and
- f. Connectivity to foreign Patent offices (EPO/JPO).

C.4.19.2 Network Operations is responsible for the operation and maintenance of USPTO's:

- a. LAN and WAN infrastructure.
- b. Network and office automation servers.
- c. Fiber optic and copper cable plant.

C.4.20 Network Operations - Network Operations Center (NOC) - Current Environment:

C.4.20.1 The USPTO currently utilizes HP-Openview Network Node Manager operating on HP-UX and Windows NT operating system to perform network management. HP-Openview is based upon Simple Network Management Protocol (SNMP) and Remote Monitor (RMON) protocols. The Contractor provides monitoring and reporting for all network devices managed by the Network Management System (NMS). The Contractor ensures maps on the NMS are accurate and up to date.

C.4.20.2 The Contractor currently uses Network Management Division's NMS to perform this function. The Contractor works with other USPTO offices to identify events that should be monitored and modifies NMS maps as necessary to successfully monitor events on those AISs. The Contractor responds to events and outages on those systems, contacts designated individuals responsible for supporting those systems, escalates as necessary, and reports on the progress of restoration. Procedures for such actions are outlined in the OSP.

C.4.21 Network Operations - Network Operations Center (NOC) - Requirements:

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C.4.21.1 The Contractor shall provide, on-site, twenty-four (24) hours per day, seven (7) days per week NOC monitoring and reporting, and shall repair and correct all problems within two (2) hours of identification or notification.

C.4.21.2 The Contractor shall operate, maintain and upgrade, as authorized by the USPTO, the USPTO's NMS.

C.4.21.3 The Contractor shall provide technical assistance in the area of enterprise management of the USPTO AIS. The Contractor shall identify events that should be monitored and modify NMS maps as necessary to successfully monitor events on those AISs.

C.4.21.4 The Contractor shall perform periodic (hourly, per shift, daily) functional and performance testing of existing production network components, paths, networks, sub-networks, systems and software as required. Verification of all tests shall be recorded in an operations log.

C.4.22 Network Operations - Network Management - Current Environment:

C.4.22.1 Day-to-day operation, maintenance and system administration of the USPTO network infrastructure devices includes but is not limited to hardware and software on routers, hubs, switches, encryption devices, and security devices. These services are performed twenty-four (24) hours a day, seven (7) days a week. The Contractor gathers network performance and statistical data for problem analysis. The Contractor troubleshoots network problems by responding to trouble calls, performing fault isolation, and restoring service.

C.4.22.2 Currently the Contractor responds within ten (10) minutes of a failure or notification by either the Help Desk or NOC and resolves ninety-five percent (95%) of all network infrastructure problems within two (2) hours of the failure.

C.4.23 Network Operations - Network Management - Requirements:

C.4.23.1 The Contractor shall provide on-site network infrastructure support Monday through Friday, from 5:30 a.m. to 7:00 p.m. The contractor shall provide on-call support Monday through Friday 7:00 p.m. to 5:30 a.m. and twenty-four (24) hours a day on Saturday, Sunday, and Holidays.

C.4.23.2 The Contractor shall provide day-to-day operation, maintenance, and system administration of the USPTO network infrastructure devices.

C.4.23.3 The Contractor shall perform capacity management, security management, configuration management, and performance management on network infrastructure devices.

C.4.23.4 The Contractor shall support the operation of the USPTO's firewalls, to include the operating system, and the support of the Checkpoint firewall software.

C.4.23.5 The Contractor shall be responsible for upgrading network infrastructure hardware/software/firmware as directed. The Contractor shall produce an Installation Plan for all upgrades. The Contractor shall install upgrades approved by the USPTO. The USPTO shall provide hardware and software used in the upgrade.

C.4.23.6 The Contractor shall support the USPTO Office of Systems Architecture and Engineering (OSAE) as required during the implementation phase of major network engineering tasks.

C.4.23.7 The Contractor shall operate, maintain, and upgrade HP Node Manager, HP ITO, NetIQ, BMC (Patrol) and Nortel Opivity associated with the USPTO's NMS.

C.4.23.8 The Contractor shall perform preventive maintenance, operate, and maintain Nortel's Giga-bit Ethernet equipment.

C.4.23.9 The Contractor shall operate and maintain a Windows 2000 networking infrastructure.

C.4.24 Network Operations - Network and Office Automation Server - Current Environment:

C.4.24.1 Day-to-day operation, maintenance and system administration of the network and office automation servers is primarily focused on but is not limited to Windows NT servers, Microsoft Back Office suite of products, and third party commercial off the shelf (COTS) applications that support Windows NT servers. The Contractor responds to and fixes network and office

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automation server problems. These services are performed twenty-four (24) hours a day, seven (7) days a week. The Contractor gathers server performance and statistical data for problem analysis. The Contractor troubleshoots server problems by responding to trouble calls, performing fault isolation, and restoring service.

C.4.24.2 The USPTO currently uses Microsoft Systems Management Server (SMS) to perform software distribution.

C.4.24.3 The USPTO currently uses Microsoft Exchange for its electronic mail (e-mail) system.

C.4.24.4 The Contractor performs regularly scheduled preventative maintenance (PM) activities on the USPTO network and office automation servers. This includes PM on the operating system as well as on any applications supported by Network Operations Division (NOD) (e.g. Microsoft Exchange and SMS).

C.4.24.5 The Contractor routinely backs-up the USPTO Network and Office Automation servers and NMS servers per established standard operating procedures. The Contractor coordinates the periodic shipping of tapes to an offsite storage facility.

C.4.24.6 The Contractor provides the following network and office automation server administration tasks per the time frames outlined below:

Move PTOnet logon access to a different file server	Within three (3) days after receipt of request
Increase file server space (10 Mb or less)	Within three (3) days after receipt of request
Create new PTOnet shared space	As negotiated with business area
Create new E-mail account	Within one (1) day after receipt of request
Provide access to shared network server space	Within three (3) days after receipt of request
Creation/Modification of Exchange Distribution Lists	Within three (3) days after receipt
Creation of Network Print Queues	Within three (3) days after receipt of request

C.4.24.7 The Contractor is responsible for producing an installation plan for upgrading network and office automation infrastructure hardware/software/firmware. Only those upgrades approved by the USPTO are performed. The USPTO shall provide parts used in the upgrade.

C.4.24.8 The Contractor is responsible for placing into production all network and office automation devices which includes, but is not limited to receipt, initial inventory, set up, burn-in, testing, software loading, and deployment of hardware. In performing these services, the Contractor adheres to policies and procedures as established by the USPTO.

C.4.24.9 Currently the Contractor responds within ten (10) minutes of a failure or notification by either the Help Desk or NOC and resolves ninety-five percent (95%) of all network infrastructure problems within two (2) hours of the failure.

C.4.25 Network Operations - Network and Office Automation Server - Requirements:

C.4.25.1 The Contractor shall provide technical support to the USPTO for the day-to-day operation, maintenance and system administration of the USPTO network and office automation servers. This support shall be Monday through Friday, from 5:30 a.m. to 7:00 p.m. When on-site support is required outside of these hours, the contractor shall follow established escalation procedures to arrive at the designated site within sixty (60) minutes of notification by the NOC. The contractor shall provide on-call support Monday through Friday, 7:00 p.m. to 5:30 a.m. and twenty-four (24) hours a day, Saturday, Sunday, and Holidays and shall repair and correct all problems within two (2) hours of identification or notification.

C.4.25.2 The Contractor shall perform capacity management, security management, configuration management, and performance management on network and office automation server devices.

C.4.25.3 The Contractor shall operate, maintain and upgrade, as new releases are approved, the USPTO's software distribution utility and electronic mail system.

C.4.25.4 The Contractor shall perform regularly scheduled PM activities on the USPTO network and office automation servers.

C.4.25.5 The Contractor shall operate, maintain and upgrade, as new releases are approved, the USPTO's tape back up system.

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C.4.25.6 The Contractor shall operate, maintain and upgrade, as new releases are approved, hardware, software, and connectivity associated with the USPTO's Public Key Infrastructure (PKI) operating environment and Enterprise-Wide Login (EWL) infrastructure and shall perform related system administration functions.

C.4.25.7 The Contractor shall be responsible for upgrading to new releases as approved and placing into production network and office automation infrastructure hardware/software/firmware as directed.

C.4.26 Network Operations - Network Cabling - Current Environment:

C.4.26.1 The Contractor provides cable and infrastructure installation and maintenance for the network cable plant per the time frames outlined below:

Installations of network drops (regular)	Within fifteen (15) days after receipt of request
Installations of network drops (priority)	As negotiated with the customer and approved by the OCIO
Activation of network drops (five (5) or less)	Within one (1) day after receipt
Activation of network drops (five (5) or more)	Within five (5) days after receipt of request
Activation of network drops (priority)	As negotiated with the customer and approved by the OCIO
Deactivation of existing network drops	Within three (3) days after receipt of request

C.4.26.2 The Contractor arrives on-site to resolve all fiber optic cable outages within two (2) hours of notification of the problem and resolves ninety-five percent (95%) of all fiber optic cable problems within four (4) hours.

C.4.26.3 The Contractor arrives on-site to resolve all user network cable outages within two (2) hours of notification of the problem and resolves ninety-five percent (95%) of all user network cable outages within four (4) hours.

C.4.27 Network Operations - Network Cabling - Requirements:

C.4.27.1 The Contractor shall provide on-site network cabling support Monday through Friday, from 6:30 a.m. to 5:00 p.m. When on-site support is required outside of these hours, the contractor shall follow established escalation procedures to arrive at the designated location within sixty (60) minutes of notification by the NOC.

C.4.27.2 The Contractor shall provide day-to-day operation, maintenance of the USPTO's fiber optic and copper cable plant. The Contractor shall respond to and fix USPTO net cabling problems. These services shall be performed twenty-four (24) hours a day, seven (7) days a week, excluding Holidays observed by the USPTO.

C.4.27.3 The Contractor shall gather network performance and statistical data for problem analysis. The Contractor shall troubleshoot cabling problems by responding to trouble calls, performing fault isolation and restoring service.

C.4.27.4 The Contractor shall perform configuration management, capacity management, and cable and infrastructure installation and maintenance of the USPTO's cable plant.

C.4.27.5 The Contractor shall install, and test network cabling in accordance with policies and procedures as set by the USPTO.

C.4.28 NT/UNIX Operating Systems Support - Description (current staffing level - 7):

C.4.28.1 Provides support to the operations staff and application programmers by maintaining the Windows NT (servers only) and UNIX operating systems. This involves ongoing activity in the areas of system software, systems administration, TCP/IP, Internet services, hardware configuration upgrades, high availability software, and automated operations. Operating system support involves the maintenance/upgrades to products from Microsoft, Input Accel, Wang, Kodak, HP, Sun, and other vendors.

C.4.29 NT/UNIX Operating Systems Support - Current Environment:

C.4.29.1 The Contractor currently provides technical services to maintain the production environment for the HP AIS Application servers running on the Windows NT Operating System and the HP/UX and Sun servers. This includes periodic upgrades to Windows NT Servers, UNIX Servers and all other vendor supporting system software.

C.4.30 NT/UNIX Operating Systems Support - Requirements:

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C.4.30.1 The Contractor shall provide technical support to maintain the production environment for the HP AIS Application servers running on the Windows NT Operating System and the HP/UX and Sun servers. This will include periodic software upgrades, as approved by the USPTO, to Windows NT Servers, UNIX servers (review existing available patches, install patches, etc.), and to all other vendor supported system software.

C.4.30.2 The Contractor shall provide technical support to develop, program, test and implement system software utilities for both the UNIX based and Windows NT based application platforms. All new programs and processes will operate in an "unattended operations" central computer environment.

C.4.30.3 The Contractor shall provide technical support and troubleshooting assistance for the application development community by answering questions on application interfaces to the operating system and identifying production anomalies to developers for their corrective action.

C.4.30.4 The Contractor shall provide technical support required for any necessary hardware upgrades and maintenance, including monitoring the performance of existing hardware. This task will be a continuous effort.

C.4.30.5 The Contractor shall provide support for day-to-day operational support, troubleshooting problem records assigned, and taking proper corrective actions. This may involve complete reloading of servers, intricate system administration troubleshooting, and proper corrective actions.

C.4.30.6 The Contractor shall assist the USPTO personnel in the installation of system software during non-production hours. The Contractor shall provide off-hour on-call support following the installation of any system software process or hardware. Non-production and off-hour support is defined as outside the principal period of performance hours. The Contractor shall periodically provide twenty-four (24) hour on-call support as assigned.

C.4.30.7 The Contractor shall provide on-site maintenance support for the UNIX and NT AIS servers Monday through Friday, 5:30 a.m. to 7:00 p.m.. The Contractor shall provide on-call maintenance support for the UNIX and NT AIS servers Monday through Friday, 7:00 p.m. to 5:30 a.m. and twenty-four (24) hours a day, Saturday, Sunday, and Holidays with a ten (10) minute response and, if required, arrive on-site within two (2) hours.

C.4.31 Data Base Administration (DBA) Support - Description (current staffing level - 7):

C.4.31.1 This involves ongoing activity in the areas of Oracle and BRS system software maintenance, Oracle database administration, and automation of database services within the Oracle Enterprise Manager (OEM) for Oracle databases as well as writing scripts to automate maintenance of the BRS file system.

C.4.32 Data Base Administration (DBA) Support - Current Environment:

C.4.32.1 The current Contractor is responsible for coding, testing and implementing any new program products, processes and scripts used to automate operational activities such as file reorganization, space management and resolutions to system alarms. The Task Manager or DBAD Manager approves test procedures, and new and revised documentation. The programming services provided included, but are not be limited to, the following:

- a. Analysis of the requirements;
- b. Development of the coding specification and detailed design;
- c. Development of programs, libraries, and/or scripts;
- d. Development of test scripts and data, (USPTO DBA shall assist in this parallel testing);
- e. Development of the installation plan and implementation of all processes and procedures;
- f. Development of documentation of the procedures and methodology applicable to the proper maintenance of the program(s).

C.4.32.2 The Contractor documents operational procedures to completely describe any new processes and procedures. The Contractor logs, schedules and tracks all changes in EAMS. The Contractor or a member of the computer operations staff logs all problems resulting from any new processes and procedures in the EAMS. The Contractor also uses Oracle Meta-link to diagnose Oracle problems, track patches, and problem tickets. The Contractor is responsible for all corrections to that code and for repairs to the system or database.

C.4.32.3 The Contractor shall participate with the USPTO in the current effort to standardize the implementation of Oracle databases and improve the management and maintenance for the Oracle production and test environments at the USPTO. The

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Contractor must be able to demonstrate skill with the OEM version 2.0.4 and must incorporate all Oracle maintenance and management programs, scripts or actions to resolve alerts in OEM.

C.4.33 Data Base Administration (DBA) Support - Requirement:

C.4.33.1 The Contractor shall provide on-site technical support from 6:00 p.m. to 6:00 a.m. Monday through Friday and provide twenty-four (24) hour support Saturday, Sunday, and holidays, for technical services to monitor and maintain the Oracle and BRS production and test databases running on HP-UX and HP-NT servers. This shall include periodic software upgrades to the Oracle and BRS software.

C.4.33.2 The Contractor shall provide technical support and troubleshooting assistance for the application development community by answering questions on application interfaces to the operating system and identifying production anomalies to developers for their corrective action.

C.4.33.3 The Contractor shall provide subject matter experts for special projects as requested. The Contractor shall study issues as it relates to the USPTO environment and shall document that analysis along with an action plan to remedy a problem, initiate a process or procedure, roll out products onto the appropriate servers and/or enhance current operations. This subject matter expert shall mentor both the USPTO and Contractor personnel as necessary in the expertise.

C.4.34 User ID and Password Administration - Description (current staffing level - 6):

C.4.34.1 Responsible for the administration of all user ID's and Passwords to PTONet Systems.

C.4.35 User ID and Password Administration - Current Environment:

C.4.35.1 Currently the Contractor is fulfilling ninety-five percent (95%) of the following request per the time frames outlined below:

Create new PTONet Login ID and Password	Within 1 day after receipt of approved request
Create Mail@Home ID and have materials ready for user	Within three (3) days after receipt of approved request
Create new E-mail account	Within one (1) day after receipt of approved request
Create new firewall ID	Within one (1) day after receipt of approved request
After verifying the identity of a user, create a new PKI certificate or renew an existing certificate and provide user with an identification number and authorization code.	Within one (1) day after receipt of approved request
Move PTONet logon access to a different file server	Within three (3) days after receipt of request
Delete PTONet ID, firewall ID, E-mail ID, and Mail@Home ID	Within one (1) day after receipt of request
Revoke PKI certificates and recover PKI keys.	Within three (3) days after receipt of request

C.4.36 User ID and Password Administration - Requirements:

C.4.36.1 The Contractor shall provide on-site Login and Password administration support 5:30 a.m. to 12:00 a.m. (midnight), Monday - Friday, excluding Holidays observed by the USPTO.

C.4.36.2 The Contractor shall provide technical assistance in the area of enterprise management for the USPTO AIS Login ID's and Passwords using the EWL system. The Contractor shall respond to events and outages on EWL, contact designated individuals responsible for supporting those systems, escalate as necessary, and report on the progress of restoration.

C.4.36.3 The Contractor shall conduct security audits as requested by the USPTO.

C.4.37 Technical Writing/Document Development - Description:

C.4.37.1 Responsible for developing, delivering and distributing informational end user documentation, Technical Notes, and technical writings for the Help Desk's Intranet web site.

C.4.38 Technical Writing/Document Development - Current Environment (current staffing level - 4):

C.4.38.1 The Contractor assists in the fulfillment and distribution of publications.

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C.4.39 Technical Writing/Document Development - Requirements:

C.4.39.1 The Contractor shall prepare user and service guides pertaining to the use of COTS software and government developed software applications. The Contractor shall develop user guides using PageMaker 6.5 software matching the publication specifications and technical standards established by the USPTO. For each user or service guide, the Contractor shall be responsible for delivering a camera-ready PageMaker 6.5 document in both electronic and hard copy formats within three weeks from initial assignment. The contractor will be required to meet with the USPTO management, service providers, and end users, in determining scope, content, and procedural issues contained in each guide. The development of new guides, along with existing guides requiring revision, will be required at the approximate rate of two (2) or three (3) per month.

C.4.39.2 The Contractor shall assist in preparing CIO News, an information technology newsletter produced quarterly from the OCIO. The Contractor support includes the authoring of information technology and office automation articles; layout and design of each issue; printing and distribution of each issue. The contractor will be required to meet with the USPTO management, service providers, and end users, in determining scope and content of each issue.

C.4.39.3 The Contractor shall assist in creating Technical Notes for use by OCIO staff personnel and OCIO Help Desk personnel. Each Technical Note must be developed in accordance with the OCIO Technical Notes Directives System, must be approved by Customer Information Services Division (CISD), and must be made available in both electronic and hard copy formats. The contractor will be required to meet with the USPTO management, service providers, and end users, in determining procedural issues that are required for each Technical Note.

C.4.39.4 The Contractor shall provide a Technical Writer to support Help Desk documentation requirements. These requirements consist of Knowledge Pak documentation and written documentation for the Help Desk Web site.

C.4.40 Warehouse Operations - Description (current staffing level - 7):

C.4.40.1 The Warehouse Operations task supports a variety of different requirements. The Warehouse serves as the: single point of shipping and receiving for IT equipment (includes CPU, monitor, printer, etc); single point of process, for property management purposes and for all delivered IT equipment; point of process Return Merchandise Authorization (RMA) requests for defective equipment; and, the point of process for excess equipment. Also provided under the Warehouse Operations task is the delivery of equipment to the USPTO campus for installation and the removal of equipment from the USPTO campus for excessing.

C.4.41 Warehouse Operations - Current Environment:

C.4.41.1 The contractor currently scans all new equipment delivered to the warehouse within two (2) working days from date of receipt, for example, if delivery occurs on Monday, all assets must be scanned by COB Wednesday.

C.4.41.2 The contractor currently is responsible for scanning all assets brought to the warehouse for immediate excess, within three (3) working days and within ninety-eight percent (98%) accuracy or the incorrect skids will be redone at no additional cost to the government.

C.4.41.3 The contractor currently sends the list of recently delivered hardware to the COTR within four (4) hours of receipt of the hardware at the warehouse.

C.4.41.4 The contractor currently conducts all warehouse activities in an ISO 9000 certified facility which is approximately 9,000 square feet in size.

C.4.42 Warehouse Operations - Requirements:

C.4.42.1 The contractor shall provide support from 6:30 a.m. to 4:30 p.m., Monday through Friday.

C.4.42.2 Contractor shall provide a facility located in Virginia, within a 5-mile radius of the USPTO.

C.4.43 Hardware Maintenance - Description (current staffing level - 1):

C.4.43.1 Provide both hardware and operating system software support for a variety of hardware platforms. This hardware includes servers, scanners and printers (anything not covered as part of a desktop unit).

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C.4.44 Hardware Maintenance - Current Environment:

C.4.44.1 Currently maintenance of the equipment is provided through a variety of contracts, warranties and purchase orders, that either the USPTO manages or are performed as part of the USPTO contracts. This includes Promark printers, Xerox printers, and Fujitsu scanners.

C.4.45 Hardware Maintenance - Requirements:

C.4.45.1 See Attachment "Hardware Listing" for list of equipment to be supported.

C.4.45.2 Future Requirements. In reference to the column entitled "Maintenance Required Current/Future", Contractor is not required, at this time, to provide pricing information for those items designated "Future." This is for informational purposes only and to provide notice that at some point during the contract life, at the option of the USPTO, the USPTO anticipates that the maintenance of those items will become the responsibility of the Contractor.

C.4.46 Carlyle Move (Future Requirement #1):

C.4.46.1 The contractor may perform the following:

- a. Client-Equipment Relocation Support - includes all IT equipment not located in the Data Center, Emerging Technology Center, CPK3-4th floor data center, or other remote "data centers" as identified by USPTO. Includes such equipment as personal-computer workstations (includes desktop printers and scanners), high-speed printers, high-speed scanners, etc. This area may also include the relocation of general office equipment such as photocopiers and facsimile machines.
- b. Server-Equipment Relocation Support - includes all IT equipment located in the Data Center, Emerging Technology Center, CPK3-4th floor data center, or other remote "data centers" as identified by USPTO. Includes such equipment as NT servers, UNIX servers, mass storage, tape libraries, high-speed scanners and high-speed printers.
- c. Telecommunication Support - includes the operation, administration and support of the USPTO voice communications system(s). The voice system and support includes; help desk support for telephone problems and repairs, telephone repair support, voice-messaging administration and support, PBX administration and maintenance for telephone equipment. (Includes maintaining the telephone number system within the PBX call accounting system and the assignment of new telephone numbers, changes, and deletions. The support would also include ordering, tracking and bill reconciliation of services from the telephone company, including remote access (i.e., work at home) telephone support, and video teleconferencing support.

C.4.47 Inventory Support (Future Requirement #2):

C.4.47.1 The purpose of this task is to provide the USPTO with maintenance services for the inventory module within the EAMS. These services shall be in the form of data maintenance and inventory verification support. The activities in this task include: inventory support, quality assurance, financial reconciliation, training, and documentation.

C.4.47.2 Inventory support includes:

- a. Execution of the Asset Management guidelines and schedules of activities as determined by the USPTO's Asset Management Team.
- b. Distribution of monthly Property Custodian report packages.
- c. Updates to the systems based on the custodian reports and other asset management forms (Home Use, Transfer of Assets, etc) and ensure all updates are made correctly and within the required time frames. Processing of these reports should be within ninety-five percent (95%) accuracy and within forty-eight (48) hours of receipt.
- d. Maintenance of the official Property Custodian listing.
- e. Issuance of all Department of Commerce provided bar code labels (i.e., CD bar code labels).
- f. Creation and issuance of all non-Department of Commerce provided bar code labels.
- g. Processing of surplus reports.
- h. Receive and process on a daily basis collected data from either the Psion Workabout or Radio units.
- i. Daily and weekly reconciliation of the "To-Be Assigned" Property Custodian listing ensuring that all assets are properly assigned with ninety-five percent (95%) accuracy.
- j. Adding new asset descriptions as assets are deployed.
- k. Standardization of asset descriptions for existing and newly acquired assets.

C.4.47.3 Quality assurance includes:

- a. Physically observing and validating 10% of the assets on the custodian's current Property Custodian report and 10% of the assets found in the custodian's area to their current Property Custodian report.

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b. Property Custodian Quality Assurance package must be completed in the system and provided to the PTO within two (2) business days after completion of the verification.

c. Performing weekly data quality fieldwork to ensure the validity of the asset data is at a minimum ninety-five percent (95%) accurate at all times. Special emphasis should be placed on the following:

- (1) Assets with "Not Accessible" in the serial number field.
- (2) Assets with "duplicate" serial numbers.
- (3) Assets with "unusual" serial number configurations.

C.4.47.4 Financial reconciliation includes:

a. Performing financial reconciliation activities for all assigned financial documents. Such activities may require interaction with designated USPTO employees, Property Custodians, and/or contractors.

b. Assignments must be completed within five (5) business days from the assigned date.

c. Providing a weekly status of all assignments.

C.4.47.5 Training and documentation includes:

Providing the training, documentation, and classes to support all Asset Management functions in the hand-held units. Such classes are on an "as needed basis" but shall not exceed twenty (20) classes per month.

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SECTION D -- PACKAGING AND MARKING

D.1 PACKING AND MARKING

(a) Packing, labeling and marking of some items to be delivered under this contract must comply with the Statement of Work and with instructions to be provided by the Contracting Officer's Technical Representative.

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SECTION E -- INSPECTION AND ACCEPTANCE

E.1 52.252-02 CLAUSES INCORPORATED BY REFERENCE

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. Also, the full text of a clause may be accessed electronically at this/these address(es):

[Insert one or more Internet addresses]

Clause	Title	Date
52.246-06	Inspection--Time-And-Material And Labor-Hour	May 2001

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SECTION F -- DELIVERIES OR PERFORMANCE

F.1 52.252-02 CLAUSES INCORPORATED BY REFERENCE

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. Also, the full text of a clause may be accessed electronically at this/these address(es):

[Insert one or more Internet addresses]

Clause	Title	Date
52.242-17	Government Delay Of Work	April 1984

F.2 IDENTIFICATION OF CONTRACT DELIVERABLES

Unless otherwise specified, all documents prepared and submitted by the Contractor to the Government under this contract shall include the following information on the cover page of each document:

- Name and business address of the Contractor;
- Contract number and task order number;
- Date of report; and
- Name and office location of the COTR

F.3 DELIVERABLES

Each task order will specify the deliverables to be produced by the Contractor and the delivery date. All documentation deliverables shall be submitted first in draft form. The Government will have up to fifteen (15) working days to determine the acceptability of all completed draft deliverables and ten (10) working days to determine the acceptability of all completed final deliverable. Deficiencies in draft and final deliverables shall be corrected by the Contractor within ten (10) working days of notification by the Government. In addition to the services required under the contract, the Contractor shall be required to provide the following deliverables, after completion of each PTO task order:

- Deliverables stated in each of the assigned task orders.
- Monthly Status Reports (See Section F.5 "MONTHLY STATUS REPORT")

F.4 GOVERNMENT HOLIDAYS

The following legal holidays are observed by this contract:

New Year's Day	January 1
Thanksgiving Day	Fourth Thursday in November
Christmas Day	December 25

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The Contractor shall comply with the aforementioned Government holidays and any other day designated by Federal Statute, Executive Order, or Presidential proclamation, therefore, the Government offices are closed to the Contractor's staff on the day(s) these holidays are observed. In addition, work may not be required of the Contractor when Federal employees are released from work early due to inclement weather conditions or when Federal offices are closed due to inclement weather conditions. The COTR will notify the Contractor when early release of Federal employees has been authorized.

F.5 MONTHLY STATUS REPORT

The Contractor shall submit a monthly status report, covering the first day of the month through the last day of the month. One (1) copy each of the status report is due, in electronic format, to the COTR and the CO seven (7) working days following the last day of the month. The format for the status report shall include a contract summary sheet to include the contract number and title, a task by task status report, a summary of problems, and a summary of expenditures. Each task in progress shall be summarized to identify the Task Order Manager for both the USPTO and the Contractor, the task objective, progress, planned activities, information about deliverable status, and problems. The problem summary section shall describe any problems and proposed solutions, if applicable, and problem resolutions. The expenditures section shall summarize tabularly and/or graphically estimated costs and labor hours, overall and by task. Data shall include:

- (1) Labor hours and dollar amounts expended for each labor category from the effective date of the contract thru the last day of the current reporting month;
- (2) Labor hours and dollar amount expended by category during the current reporting month;
- (3) Estimates of labor hours (by category) to be expended during the next reporting month; and
- (4) Identification of direct labor hours of prime Contractor and subcontractor(s), if applicable.

In addition to the monthly status report, the COTR will have the Contractor generate other reports as necessary.

F.6 PERIOD OF PERFORMANCE

The period of performance of this contract is as follows:

- Base Year: July 3, 2002 - July 2, 2003
- Option Year 1: July 3, 2003 - July 2, 2004
- Option Year 2: July 3, 2004 - July 2, 2005
- Option Year 3: July 3, 2005 - July 2, 2006
- Option Year 4: July 3, 2006 - July 2, 2007
- Option Year 5: July 3, 2007 - July 2, 2008
- Option Year 6: July 3, 2008 - July 2, 2009
- Option Year 7: July 3, 2009 - July 2, 2010
- Option Year 8: July 3, 2010 - July 2, 2011
- Option Year 9: July 3, 2011 - July 2, 2012

F.7 PLACE OF DELIVERY

The deliverable items to be furnished hereunder shall be delivered to the COTR as named in Section G of the contract.

F.8 PLACE OF PERFORMANCE

The effort required under this contract shall be performed at the USPTO currently located in Arlington, VA, the Contractor's facilities and/or other sites designated by the USPTO. Each task order will specify the place of performance.

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F.9 PRINCIPAL PERIOD OF PERFORMANCE

The principal period of performance will be specified in each task order.

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SECTION G -- CONTRACT ADMINISTRATION DATA

G.1 CONTRACT ADMINISTRATION

Notwithstanding the Contractor's responsibility for total management during the performance of this contract, the administration of the contract will require maximum coordination between the Government and the Contractor. The following individuals will be the Government point of contact during the performance of the contract.

A. Contracting Officer's Technical Representative (COTR)

(1) The COTR will be designated on authority of the CO to monitor all technical aspects and assist in administering the contract. The types of actions within the purview of the COTR's authority are to assure that the Contractor performs the technical requirements of the contract; to perform or cause to be performed inspection necessary in connection with Contract concerning the aspects of the contract within his/her purview; to issue written interpretations of technical requirements of the Government drawings, designs, and specifications; to monitor the Contractor's performance under the contract and notify the Contractor and CO of any deficiencies observed; and to coordinate Government-Furnished Property availability and provide for site entry of Contractor personnel, if required. A letter of designation will be issued to the COTR with a copy supplied to the Contractor, stating the responsibilities and limitations of the COTR. This letter will clarify to all parties to this contract the responsibilities of the COTR.

(2) Tom King, is hereby designated as the COTR. The COTR may be changed at any time by the Government without prior notice to the Contractor but notification of the change, including the name and address of the successor COTR, will be promptly provided to the Contractor by the CO in writing.

NAME: Tom King
ADDRESS: U.S. Patent and Trademark Office
Office of Chief Information Officer
21211 Crystal Drive
Crystal Park Two, Suite 1002
Arlington, VA 22202
PHONE: (703) 305-8999

(3) The responsibilities and limitations of the COTR are as follows:

(a) The COTR is responsible for the technical aspects of the project and technical liaison with the Contractor. The COTR is also responsible for the final inspection and acceptance of all reports, and such other responsibilities as may be specified in the contract.

(b) The COTR is not authorized to make any commitments or otherwise obligate the Government or authorize any changes which affect the scope of work, contract price, or other mutually agreed upon terms or provisions of the contract. Any Contractor request for changes shall be referred to the Contracting Officer (CO) directly or through the COTR. No such changes shall be made without the expressed prior authorization of the CO. The COTR may designate assistant COTR(s) to act for him/her by naming such an assistant in writing and transmitting a copy of such designation through the CO to the Contractor.

B. Task Manager(s)

All Task Manager(s) will be designated on authority of the CO to monitor all day-to-day aspects of task orders in conjunction with the COTR. The Task Managers will have the equivalent authority as the COTR under the contract with regard to the specific task assigned. The Task Manager(s) will be designated in all task orders.

C. Contracting Officer (CO)

All contract administration will be effected by the CO. Communications pertaining to contract administration matters will be addressed to the CO. No changes in or deviation from the scope of work shall be effected without a Supplemental Agreement executed by the CO authorizing such changes.

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G.2 CONTRACT ADMINISTRATIVE OFFICE

This contract will be administered by:

NAME: Office of Procurement
ADDRESS: U.S. Patent and Trademark Office
Office of Procurement
2011 Crystal Drive
Crystal Park One - Suite 810
Arlington, VA 22202
PHONE: (703) 305-8014

Written communications to the CO shall make reference to the contract number and shall be mailed to the above address.

G.3 CONTRACTING OFFICER'S AUTHORITY

The CO is the only person authorized to make or approve any changes in any of the requirements of this contract and notwithstanding any provisions contained elsewhere in this contract, the said authority shall remain solely with the CO. In the event the Contractor makes any changes at the direction of any person other than the CO, the change will be considered to have been made without authority and no adjustment will be made in the contract price to cover any increase in costs incurred as a result thereof.

G.4 SEGREGATION OF COSTS BY TASK ORDER

As referenced in Section G clause entitled, "SUBMISSION OF INVOICES," all costs shall be accumulated and invoiced by individual task order for billing purposes.

G.5 SUBMISSION OF INVOICES

The Contractor shall submit proper invoices on a monthly basis for payment one (1) original and two (2) copies of each invoice shall be submitted for each task order. Invoices shall, if applicable, deduct the withholding amount as specified in FAR 52.232-7, Payments Under Time-and-Materials and Labor-Hour Contracts APR 1984), contained in Section I "CONTRACT CLAUSES" of this contract. All invoices shall be submitted to the following address:

Courier or Hand Delivery

U.S. Patent and Trademark Office
Office of Finance
2011 Crystal Drive - Suite 802B
Arlington, VA 22202

U.S. Mail Delivery

U.S. Patent and Trademark Office
Office of Finance
2011 Crystal Drive, Box 17
Washington, DC 20231

To constitute a proper invoice, each invoice submitted must include the following information and attached documentation:

- (1) Name of the Contractor, invoice number and invoice data;
- (2) Contract number and task order number (one per invoice);
- (3) Description, price, and quantity of services actually delivered or rendered;
- (4) Name of Personnel performing the service, Labor-Hour Category, number of hours worked and cost;
- (5) Payment terms;
- (6) Name and signature of certifying official, title, phone number, and complete mailing address of responsible office to whom payment is to be sent;

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- (7) Period of performance covered by the invoice;
- (8) Other substantiating documentation or information as required by the contract; and
- (9) The following statement on the reverse side of the original of each invoice:

COTR'S CERTIFICATION:

I certify to the best of my knowledge and belief that the services/products shown on the invoice have been performed and are accepted.

COTR Signature

Date

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SECTION H -- SPECIAL CONTRACT REQUIREMENTS

H.1 ACCESS TO GOVERNMENT FACILITIES

During the life of the contract, the rights of ingress and egress to and from the Government facility for Contractor personnel shall be made available as required per each individual task order. During all operations on Government premises, Contractor personnel shall comply with the rules and regulations governing the conduct of personnel and the operation of the facility. The Government reserves the right to require Contractor personnel to sign in upon ingress and sign out upon egress to and from the Government facility.

H.2 CONTRACT TYPE

This is a labor-hour and time and material type contract.

H.3 DUPLICATION AND DISCLOSURE OF CONFIDENTIAL DATA

Duplication or disclosure of confidential data provided by the USPTO or to which the Contractor will have access as a result of this contract is prohibited. It is understood that throughout performance of the contract the Contractor may have access to confidential data which is the sole property of the USPTO, as well as access to proprietary data which is the sole property of other than the contracting parties. The Contractor hereby agrees to maintain the confidentiality of all such data to which access may be obtained throughout contract performance whether title thereto vests in the USPTO or otherwise. The Contractor hereby agrees not to disclose said data, any interpretations thereof or data derivative therefrom, to unauthorized parties in contravention of these provisions without prior written approval of the CO or the party in which title thereto is wholly vested. This clause also applies to any subcontractors and/or consultants used by the Contractor.

H.4 DUPLICATION OF EFFORT

The Contractor hereby certifies that costs for work to be performed under this contract and any subcontract hereunder are not duplicative of any costs charged against any other Government contract, subcontract or other Government source. The Contractor agrees to advise the CO, in writing, of any other Government contract or subcontract it has performed or is performing which involves work directly related to the purpose of this contract. The Contractor also certifies and agrees that any and all work performed under this contract shall be directly and exclusively for the use and benefit of the Government, not incidental to any other work, pursuit, research or purpose of the Contractor, whose responsibility it will be to account for it accordingly.

H.5 GOVERNMENT AND CONTRACTOR FURNISHED FACILITIES AND EQUIPMENT

The USPTO will provide the Contractor with access to any aspect of its automated environment and to any existing documentation needed to carry out this project. The USPTO will provide space to the Contractor when space is available for this effort. The Contractor shall be responsible for its own leasing arrangements i.e., Warehouse Space reference C.4.40 - C.4.42. The USPTO will not provide any Government-furnished equipment under this contract, except as specifically provided in Section C.

H.6 GOVERNMENT FURNISHED DATA

The Government shall deliver to the Contractor, as may be requested, Government-Furnished Data (GFD) during the performance of this contract. GFD will be delivered to the Contractor as specified in each task order.

Title to GFD shall remain in the Government, and the Contractor shall use the GFD only in connection with this contract.

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Upon completion or termination of this contract, the Contractor shall return to the Government all GFD.

H.7 GOVERNMENT INVESTIGATION/SUITABILITY INVESTIGATION REQUIREMENTS

Contract Language for use by Contracting Officers for Low Risk and Moderate Risk Contracts

Contractors -

Each contract employee working for over 180 days under this contract must undergo investigative processing. The investigation that will be conducted by the Office of Personnel Management (OPM) is a National Agency Check with Inquires (NACI).

(NOTE: Low Risk contracts whose duration is less than 180 days do not ordinarily require processing. However, even though the contract is short in duration, based on any unusual circumstances that may exist, Special Agreement Checks (SACs) may be requested, at the discretion of the Contracting Officer's Technical Representative (COTR) and/or the USPTO Security Office.)

Investigative Processing -

The COTR, in conjunction with the contractor's Project Manager, is responsible for initiating and ensuring the accuracy and completeness of the investigative package for each contract employee. Once the packages have been reviewed, packages will then be forwarded to the USPTO Security Office for further processing, e.g., fingerprinting, etc. Investigative paperwork must be submitted to the USPTO Security Office and forwarded to the OPM within 14 days after the Subject's performance on the contract.

Processing Requirements -

The investigative package must contain the following investigative forms: SF-85, Questionnaire for Non Sensitive Positions; FD 258, Fingerprint Chart; and the OF 306, Declaration for Federal Employment.

Non U.S. citizens to be employed under this contract must:

- a. Have official legal status in the United States; and
- b. Have continuously resided in the United States for the last 2 years

If the USPTO Security Office receives disqualifying information on a contract employee, the Contractor, upon notice, will immediately remove the employee from their duties under this contract. Contract employees may be barred from working on the premises of a facility for any of the following:

- a. Falsification of information entered on the investigative forms.
- b. Conviction of a felony or a crime of violence or of a misdemeanor involving moral turpitude.
- c. Improper conduct once performing on the contract, including criminal, infamous, immoral, or notoriously disgraceful conduct or other conduct prejudicial to the Government regardless of whether the conduct directly relates to the contract.
- d. Any behavior judged to pose a potential threat to USPTO personnel or property.

Failure to comply with these requirements may result in the cancellation of this contract.

H.8 INSURANCE COVERAGE

Pursuant to the clause "Insurance - Work on a Government Installation (FAR 52.228-5)," the Contractor will be required to present evidence to show, at a minimum, the amounts of insurance coverage indicated below:

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a. **Workers Compensation and Employer's Liability.** The Contractor is required to comply with applicable Federal and State workers' compensation and occupational disease statutes. If occupational diseases are not compensable under those statutes, they shall be covered under the employer's liability section of the insurance policy, except when contract operations are so commingled with a Contractor's commercial operations that it would not be practical to require this coverage. Employer's liability coverage of at least \$100,000 shall be required, except in states with exclusive or monopolistic funds that do not permit workers' compensation to be written by private carriers.

c. **Automobile Liability.** The Contractor shall have automobile liability insurance written on the comprehensive form of policy. The policy shall provide for bodily injury and property damage liability covering the operation of all automobiles used in connection with performing the contract. Policies covering automobiles operated in the United States shall provide coverage of at least \$200,000 per person and \$500,000 per occurrence for bodily injury and \$20,000 per occurrence for property damage.

d. **Aircraft Public and Passenger Liability.** When aircraft are used in connection with performing the contract, the Contractor shall have aircraft public and passenger liability insurance. Coverage shall be at least \$200,000 per person and \$500,000 per occurrence for bodily injury, other than passenger liability, and \$200,000 per occurrence for property damage. Coverage for passenger liability bodily injury shall be at least \$200,000 multiplied by the number of seats or passengers, whichever is greater.

H.9 KEY PERSONNEL

A. The Contractor shall assign to this contract the following key personnel:

Labor Categories

Program Director
 Project Manager
 Quality Manager
 Customer Services Manager
 Help Desk Task Manager
 Field Engineer Task Manager
 Asset Manager

B. During the first 180 days of performance, the Contractor shall make no substitutions of key personnel unless the substitution is necessitated by illness, death, or termination of employment. The Contractor shall notify the CO within fifteen (15) calendar days after the occurrence of any of these events and provide the information required by paragraph (c) below. After the initial 180-day period, the Contractor shall submit the information required by paragraph (c) to the CO at least fifteen (15) days prior to making any permanent substitutions.

C. The Contractor shall provide a detailed explanation of the circumstances necessitating the proposed substitutions, complete resumes for the proposed substitutes, and any additional information requested by the CO. Proposed substitutes should have comparable qualifications to those of the persons being replaced. The CO will notify the Contractor within fifteen (15) calendar days after receipt of all required information of the decision on substitutions. The contract will be modified to reflect any approved changes of key personnel.

H.10 NOTICE TO THE GOVERNMENT OF DELAYS

In the event the Contractor encounters difficulty in meeting performance requirements, or when it anticipates difficulty in complying with the contract delivery schedule or date, or whenever the Contractor has knowledge that any actual or potential situation is delaying or threatens to delay the timely performance of this contract the Contractor shall immediately notify the CO and the COTR, in writing, giving pertinent details, provided, however, that this data shall be informational only in character and that this provision shall not be construed as a waiver by the Government of any delivery schedule or date or of any rights or remedies provided by law or under this contract.

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H.11 OPTION TO EXTEND THE TERM OF THE CONTRACT

The Government may extend the term of this contract by unilateral modification to the contract on or before the last day-of the applicable period of performance.

If the Government exercises this option, the extended contract shall be considered to include this option provision.

The total duration of this contract, including the exercise of any options under this clause, shall not exceed ten (10) years from the effective date of this contract.

Exercise of this option shall be in accordance with Section F clause entitled, "PERIOD OF PERFORMANCE."

H.12 ORGANIZATIONAL CONFLICT OF INTEREST

A. The Contractor warrants that, to the best of the Contractor's knowledge and belief, there are no relevant facts or circumstances which could give rise to an organizational conflict of interest, as defined in FAR Subpart 9.5, or that the Contractor has disclosed all such relevant information.

B. The Contractor agrees that if an actual or potential organizational conflict of interest is discovered after award, the Contractor will make a full disclosure in writing to the CO. This disclosure shall include a description of actions which the Contractor has taken or proposes to take, after consultation with the CO, to avoid, mitigate, or neutralize the actual or potential conflict.

C. Remedies. The CO may terminate this contract for convenience, in whole or in part, if it deems such termination necessary to avoid an organizational conflict of interest. If the Contractor was aware of a potential organizational conflict of interest prior to award or discovered an actual or potential conflict after award and did not disclose or misrepresented relevant information to the CO, the Government may terminate the contract for default, debar the Contractor from Government contracting, or pursue such other remedies as may be permitted by law or this contract.

D. The Contractor further agrees to insert provisions which shall conform substantially to the language of this clause, including this paragraph (d), in any subcontract or consultant agreement hereunder.

H.13 OVERTIME

Unless otherwise provided in this contract, the Contractor shall not perform overtime work under or in connection with this contract for which premium compensation is required to be paid, without specific written approval from the CO.

H.14 RIGHTS IN DATA

The Government shall have unlimited rights in software first produced in the performance of this contract. For the purposes of this clause, "software first produced in the performance of this contract" shall include, but not be limited to the following: non-COTS computer programs developed or previously developed and implemented by the Contractor in the performance of this contract, related computer data bases and documentation thereof, source code, object code, algorithms, library code, library routine, and technical data of all software first produced in the performance of this contract. For the purposes of this clause, "unlimited rights" shall mean the right of the USPTO, at no extra cost to the USPTO or recipients, to use, disclose, reproduce unlimited copies, prepare derivative works, distribute unlimited copies to the public and foreign government patent offices, and perform publicly and display publicly, in any manner and for any purpose, and to have or permit others to do so.

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H.15 SECRECY AND USAGE OF PATENT INFORMATION

Work under this contract does not affect the national security. However, patent applications are required by law (35 U.S.C. 22) to be kept in confidence. Information contained in any patent application file(s) is restricted to authorized Contractor personnel on a need-to-access basis.

The Contractor acquires no right or privilege to use or disclose any information contained in any patent application file (in any form whatsoever) except to perform the work under the contract. Further, the Contractor shall not copyright or make any use or disclosure whatsoever of any patent information contained in any application or related copy or data furnished the Contractor by the Government or obtained therefrom except performing the requirements of this contract.

Security requirements of patent application file data maintained in a computer-accessible medium are an extension of the security requirements for the hard copy or the patent application folders. All processing, storage or transmission of patent application file data by means of electronic communications systems is prohibited unless use of such systems is approved by the USPTO.

All personnel having access to patent application files or data or information concerning the same, must take the following at or affirmation, signed in writing:

"I do swear or affirm that I will preserve the applications for patents in secrecy, that I will not divulge any information concerning the same to unauthorized persons while employed in work under this contract or at any time thereafter, and that I take this obligation freely, and without mental reservation or purpose of evasion."

Each employee's signed oath, or affirmation, shall be retained in the Contractor's file, subject to inspection by authorized Government representatives.

Without advance notice, the Government shall have the right to inspect the Contractor's premises, records, and work in process pertaining to the secrecy of patent information.

H.16 SUPERVISION OF CONTRACTOR'S EMPLOYEES

Personnel assigned to render services under this contract shall at all times be employees of the Contractor or its subcontractor(s) and under the direction and control of the Contractor. Notwithstanding any other provisions of this contract, the Contractor shall at all times be responsible for the supervision of its employees in the performance of the services required hereunder.

Contractor personnel shall not at any time during the contract period be employees of the U.S. Government.

H.17 TASK ORDER PROCEDURES

All work shall be initiated only by issuance of a task order fully executed by the CO. The Government is only liable for Labor hours expended under the terms and conditions of this contract to the extent that a fully executed task order has been issued and covers the required work. Charges for any work not authorized will be disallowed.

The designated COTR will initiate the task order process by preparing a statement of requirements and/or objectives to be achieved which includes performance measures in the form of a Task Objective Statement (TOS). The Contractor shall meet with the COTR to mutually discuss and agree upon the requirements and/or objectives to be achieved.

The Contractor shall prepare a proposal in response to the TOS incorporating the results of the discussions and forward it to the COTR for approval. The proposal shall contain the effective date of the task order, and the COTR and designated Task Manager's names as delineated in the TOS, a detailed description of the functional or other objectives to be achieved, a schedule for completion of the task

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order, any deliverables to be provided by the task order, any Government-furnished equipment, any Contractor-furnished items required, the labor categories required, the anticipated level of effort, and a cost ceiling.

Upon approval of the proposal by the COTR the final task order statement of work will be forwarded to the CO for execution and issuance.

The Contractor shall acknowledge receipt of each task order by returning to the CO a signed copy of the task order within two (2) work days after receipt. The Contractor shall begin work on the task order in accordance with the effective date indicated on the task order.

Following execution of the task order, technical clarifications may be issued in writing at any time by the designated COTR to amplify or provide additional guidance to the Contractor regarding performance of the task order. The Contractor shall notify the CO of any instructions or guidance the Contractor considers to be a change to the task order which will impact the cost, schedule or deliverables content of the baseline work plan. In cases where technical instructions or other events may dictate a change from the baseline, task orders may be formally modified in writing by the CO to reflect changes to tasking.

The Contractor shall not exceed the ceiling price established in each Task Order. If at any time the Contractor has reason to believe that the total amount for the Task Order, will exceed 80% (percent) of the ceiling price specified in the order, the Contractor shall notify the CO. Such notification shall include an estimate of the additional amount and, if necessary, additional time required for completion of the ordered work.

Task orders may be placed during the period of performance of the contract. Labor rates applicable to hours expended in performance of an order will be the contract rates that are in effect at the time the task order is executed. Any order issued during the period of performance of this contract and not completed within that time shall be governed by the contract terms to the same extent as if the order were completed during the contract's period of performance, including the contract and individual order ceiling prices. Work performed on such orders after the end of the contract's period of performance shall continue to be charged at the last effective rates.

H.18 52.217-08 OPTION TO EXTEND SERVICES

NOVEMBER 1999

The Government may require continued performance of any services within the limits and at the rates specified in the contract. These rates may be adjusted only as a result of revisions to prevailing labor rates provided by the Secretary of Labor. The option provision may be exercised more than once, but the total extension of performance hereunder shall not exceed 6 months. The Contracting Officer may exercise the option by written notice to the Contractor within 30 days of the end of the period of performance.
(End of clause)

H.19 PERFORMANCE MEASURES PLAN

The Government reserves the right to review, negotiate and incorporate the offeror's performance measures, incentive and disincentive plan as proposed. This will take place at a future date to be determined, but not later than 6 months after contract award.

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SECTION I -- CONTRACT CLAUSES

I.1 52.252-02 CLAUSES INCORPORATED BY REFERENCE

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. Also, the full text of a clause may be accessed electronically at this/these address(es):

[Insert one or more Internet addresses]

Clause	Title	Date
52.202-01	Definitions	December 2001
52.203-03	Gratuities	April 1984
52.203-05	Covenant Against Contingent Fees	April 1984
52.203-06	Restrictions On Subcontractor Sales To The Government	July 1995
52.203-07	Anti-Kickback Procedures	July 1995
52.204-04	Printed or Copied Double-Sided on Recycled Paper.	August 2000
52.209-06	Protecting the Government's Interest When Subcontracting With Contractors Debarred, Suspended, or Proposed for Debarment	July 1995
52.215-02 Alt I	Audit and Records--Negotiation Alternate I	January 1997
52.215-08	Order of Precedence--Uniform Contract Format	October 1997
52.215-11	Price Reduction for Defective Cost or Pricing Data--Modifications	October 1997
52.215-13	Subcontractor Cost or Pricing Data--Modifications	October 1997
52.219-06	Notice Of Total Small Business Set-Aside	July 1996
52.219-08	Utilization of Small Business Concerns	October 2000
52.222-01	Notice To The Government Of Labor Disputes	February 1997
52.222-03	Convict Labor	August 1996
52.222-21	Prohibition of Segregated Facilities	February 1999
52.222-26	Equal Opportunity	April 2002
52.222-35	Affirmative Action For Disabled Veterans and Veterans of the Vietnam Era	December 2001
52.222-36	Affirmative Action For Workers with Disabilities	June 1998
52.222-37	Employment Reports On Disabled Veterans and Veterans of the Vietnam Era	December 2001
52.223-06	Drug Free Workplace	May 2001
52.223-10	Waste Reduction Program.	August 2000
52.223-14	Toxic Chemical Release Reporting	October 2000
52.225-13	Restrictions on Certain Foreign Purchases	July 2000
52.226-01	Utilization Of Indian Organizations And Indian-Owned Economic Enterprises	June 2000
52.227-01	Authorization and Consent	July 1995
52.227-14	Rights in Data--General	June 1987
52.229-03	Federal, State And Local Taxes	January 1991
52.232-01	Payments	April 1984
52.232-07	Payments Under Time-And-Materials And Labor Hour Contracts	February 2002
52.232-09	Limitation On Withdrawing Of Payment	April 1984

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52.232-11	Extras	April 1984
52.232-17	Interest	June 1996
52.232-18	Availability Of Funds	April 1984
52.232-23	Assignment Of Claims	January 1986
52.232-25	Prompt Payment	February 2002
52.233-01	Disputes	December 1998
52.233-03	Protest After Award	August 1996
52.237-02	Protection Of Government Buildings, Equipment, And Vegetation	April 1984
52.237-03	Continuity Of Services	January 1991
52.242-03	Penalties for Unallowable Costs	May 2001
52.242-13	Bankruptcy	July 1995
52.243-03	Changes--Time-And-Material Or Labor-Hours	September 2000
52.245-05	Government Property (Cost-Reimbursement Time-And-Materials, Or Labor Hour Contracts)	January 1986
52.249-06 Alt IV	Termination (Cost Reimbursement) - Alternate IV	September 1996
52.249-14	Excusable Delays	April 1984
52.253-01	Computer Generated Forms	January 1991

I.2 52.203-08 CANCELLATION, RESCISSION, AND RECOVERY OF FUNDS FOR ILLEGAL OR IMPROPER ACTIVITY JANUARY 1997

(a) If the Government receives information that a contractor or a person has engaged in conduct constituting a violation of subsection (a), (b), (c), or (d) of Section 27 of the Office of Federal Procurement Policy Act (41 U.S.C. 423) (the Act), as amended by section 4304 of the 1996 National Defense Authorization Act for Fiscal Year 1996 (Pub. L. 104-106), the Government may--

(1) Cancel the solicitation, if the contract has not yet been awarded or issued; or

(2) Rescind the contract with respect to which--

(i) The Contractor or someone acting for the Contractor has been convicted for an offense where the conduct constitutes a violation of subsection 27 (a) or (b) of the Act for the purpose of either--

(A) Exchanging the information covered by such subsections for anything of value; or

(B) Obtaining or giving anyone a competitive advantage in the award of a Federal agency procurement contract; or

(ii) The head of the contracting activity has determined, based upon a preponderance of the evidence, that the Contractor or someone acting for the Contractor has engaged in conduct constituting an offense punishable under subsections 27(e)(1) of the Act.

(b) If the Government rescinds the contract under paragraph (a) of this clause, the Government is entitled to recover, in addition to any penalty prescribed by law, the amount expended under the contract.

(c) The rights and remedies of the Government specified herein are not exclusive, and are in addition to any other rights and remedies provided by law, regulation, or under this contract.

I.3 52.203-10 PRICE OR FEE ADJUSTMENT FOR ILLEGAL OR IMPROPER ACTIVITY JANUARY 1997

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(a) The Government, at its election, may reduce the price of a fixed-price type contract and the total cost and fee under a cost-type contract by the amount of profit or fee determined as set forth in paragraph (b) of this clause if the head of the contracting activity or designee determines that there was a violation of subsection 27 (a), (b), or (c) of the Office of Federal Procurement Policy Act, as amended (41 U.S.C. 423), as implemented in section 3.104 of the Federal Acquisition Regulation.

(b) The price or fee reduction referred to in paragraph (a) of this clause shall be--

(1) For cost-plus-fixed-fee contracts, the amount of the fee specified in the contract at the time of award;

(2) For cost-plus-incentive-fee contracts, the target fee specified in the contract at the time of award, notwithstanding any minimum fee or "fee floor" specified in the contract;

(3) For cost-plus-award-fee contracts--

(i) The base fee established in the contract at the time of contract award;

(ii) If no base fee is specified in the contract, 30 percent of the amount of each award fee otherwise payable to the Contractor for each award fee evaluation period or at each award fee determination point.

(4) For fixed-price-incentive contracts, the Government may--

(i) Reduce the contract target price and contract target profit both by an amount equal to the initial target profit specified in the contract at the time of contract award; or

(ii) If an immediate adjustment to the contract target price and contract target profit would have a significant adverse impact on the incentive price revision relationship under the contract, or adversely affect the contract financing provisions, the Contracting Officer may defer such adjustment until establishment of the total final price of the contract. The total final price established in accordance with the incentive price revision provisions of the contract shall be reduced by an amount equal to the initial target profit specified in the contract at the time of contract award and such reduced price shall be the total final contract price.

(5) For firm-fixed-price contracts, by 10 percent of the initial contract price or a profit amount determined by the Contracting Officer from records or documents in existence prior to the date of the contract award.

(c) The Government may, at its election, reduce a prime contractor's price or fee in accordance with the procedures of paragraph (b) of this clause for violations of the Act by its subcontractors by an amount not to exceed the amount of profit or fee reflected in the subcontract at the time the subcontract was first definitively priced.

(d) In addition to the remedies in paragraphs (a) and (c) of this clause, the Government may terminate this contract for default. The rights and remedies of the Government specified herein are not exclusive, and are in addition to any other rights and remedies provided by law or under this contract.

I.4 52.203-12 LIMITATION ON PAYMENTS TO INFLUENCE CERTAIN FEDERAL TRANSACTIONS JUNE 1997

(a) Definitions.

"Agency," as used in this clause, means executive agency as defined in 2.101.

"Covered Federal action," as used in this clause, means any of the following Federal actions:

(1) The awarding of any Federal contract.

(2) The making of any Federal grant.

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- (3) The making of any Federal loan.
- (4) The entering into of any cooperative agreement.
- (5) The extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

"Indian tribe" and "tribal organization," as used in this clause, have the meaning provided in section 4 of the Indian Self-Determination and Education Assistance Act (25 U.S.C. 450B) and include Alaskan Natives.

"Influencing or attempting to influence," as used in this clause, means making, with the intent to influence, any communication to or appearance before an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with any covered Federal action.

"Local government," as used in this clause, means a unit of government in a State and, if chartered, established, or otherwise recognized by a State for the performance of a governmental duty, including a local public authority, a special district, an intrastate district, a council of governments, a sponsor group representative organization, and any other instrumentality of a local government.

"Officer or employee of an agency," as used in this clause, includes the following individuals who are employed by an agency:

- (1) An individual who is appointed to a position in the Government under title 5, United States Code, including a position under a temporary appointment.
- (2) A member of the uniformed services, as defined in subsection 101(3), title 37, United States Code.
- (3) A special Government employee, as defined in section 202, title 18, United States Code.
- (4) An individual who is a member of a Federal advisory committee, as defined by the Federal Advisory Committee Act, title 5, United States Code, appendix 2.

"Person," as used in this clause, means an individual, corporation, company, association, authority, firm, partnership, society, State, and local government, regardless of whether such entity is operated for profit, or not for profit. This term excludes an Indian tribe, tribal organization, or any other Indian organization with respect to expenditures specifically permitted by other Federal law.

"Reasonable compensation," as used in this clause, means, with respect to a regularly employed officer or employee of any person, compensation that is consistent with the normal compensation for such officer or employee for work that is not furnished to, not funded by, or not furnished in cooperation with the Federal Government.

"Reasonable payment," as used in this clause, means, with respect to professional and other technical services, a payment in an amount that is consistent with the amount normally paid for such services in the private sector.

"Recipient," as used in this clause, includes the Contractor and all subcontractors. This term excludes an Indian tribe, tribal organization, or any other Indian organization with respect to expenditures specifically permitted by other Federal law.

"Regularly employed," as used in this clause, means, with respect to an officer or employee of a person requesting or receiving a Federal contract, an officer or employee who is employed by such person for at least 130 working days within 1 year immediately preceding the date of the submission that initiates agency consideration of such person for receipt of such contract. An officer or employee who is employed by such person for less than 130 working days within 1 year immediately preceding the date of the submission that initiates agency consideration of such person shall be considered to be regularly employed as soon as he or she is employed by such person for 130 working days.

"State," as used in this clause, means a State of the United States, the District of Columbia, the Commonwealth of Puerto Rico, a territory or possession of the United States, an agency or instrumentality of a State, and multi-State, regional, or interstate entity having governmental duties and powers.

(b) Prohibitions.

- (1) Section 1352 of title 31, United States Code, among other things, prohibits a recipient of a Federal contract, grant, loan, or cooperative agreement from using appropriated funds to pay any person for influencing or attempting to influence an officer or

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employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with any of the following covered Federal actions: the awarding of any Federal contract; the making of any Federal grant; the making of any Federal loan; the entering into of any cooperative agreement; or the modification of any Federal contract, grant, loan, or cooperative agreement.

(2) The Act also requires Contractors to furnish a disclosure if any funds other than Federal appropriated funds (including profit or fee received under a covered Federal transaction) have been paid, or will be paid, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with a Federal contract, grant, loan, or cooperative agreement.

(3) The prohibitions of the Act do not apply under the following conditions:

(i) Agency and legislative liaison by own employees.

(A) The prohibition on the use of appropriated funds, in subparagraph (b)(1) of this clause, does not apply in the case of a payment of reasonable compensation made to an officer or employee of a person requesting or receiving a covered Federal action if the payment is for agency and legislative liaison activities not directly related to a covered Federal action.

(B) For purposes of subdivision (b)(3)(i)(A) of this clause, providing any information specifically requested by an agency or Congress is permitted at any time.

(C) The following agency and legislative liaison activities are permitted at any time where they are not related to a specific solicitation for any covered Federal action:

(1) Discussing with an agency the qualities and characteristics (including individual demonstrations) of the person's products or services, conditions or terms of sale, and service capabilities.

(2) Technical discussions and other activities regarding the application or adaptation of the person's products or services for an agency's use.

(D) The following agency and legislative liaison activities are permitted where they are prior to formal solicitation of any covered Federal action--

(1) Providing any information not specifically requested but necessary for an agency to make an informed decision about initiation of a covered Federal action;

(2) Technical discussions regarding the preparation of an unsolicited proposal prior to its official submission; and

(3) Capability presentations by persons seeking awards from an agency pursuant to the provisions of the Small Business Act, as amended by Pub. L. 95-507, and subsequent amendments.

(E) Only those services expressly authorized by subdivision (b)(3)(i)(A) of this clause are permitted under this clause.

(ii) Professional and technical services.

(A) The prohibition on the use of appropriated funds, in subparagraph (b)(1) of this clause, does not apply in the case of--

(1) A payment of reasonable compensation made to an officer or employee of a person requesting or receiving a covered Federal action or an extension, continuation, renewal, amendment, or modification of a covered Federal action, if payment is for professional or technical services rendered directly in the preparation, submission, or negotiation of any bid, proposal, or application for that Federal action or for meeting requirements imposed by or pursuant to law as a condition for receiving that Federal action.

(2) Any reasonable payment to a person, other than an officer or employee of a person requesting or receiving a covered Federal action or an extension, continuation, renewal, amendment, or modification of a covered Federal action if the payment is for professional or technical services rendered directly in the preparation, submission, or negotiation of any bid, proposal, or application for that Federal action or for meeting requirements imposed by or pursuant to law as a condition for receiving that Federal action. Persons other than officers or employees of a person requesting or receiving a covered Federal action include consultants and trade associations.

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(B) For purposes of subdivision (b)(3)(ii)(A) of this clause, "professional and technical services" shall be limited to advice and analysis directly applying any professional or technical discipline. For example, drafting of a legal document accompanying a bid or proposal by a lawyer is allowable. Similarly, technical advice provided by an engineer on the performance or operational capability of a piece of equipment rendered directly in the negotiation of a contract is allowable. However, communications with the intent to influence made by a professional (such as a licensed lawyer) or a technical person (such as a licensed accountant) are not allowable under this section unless they provide advice and analysis directly applying their professional or technical expertise and unless the advice or analysis is rendered directly and solely in the preparation, submission or negotiation of a covered Federal action. Thus, for example, communications with the intent to influence made by a lawyer that do not provide legal advice or analysis directly and solely related to the legal aspects of his or her client's proposal, but generally advocate one proposal over another are not allowable under this section because the lawyer is not providing professional legal services. Similarly, communications with the intent to influence made by an engineer providing an engineering analysis prior to the preparation or submission of a bid or proposal are not allowable under this section since the engineer is providing technical services but not directly in the preparation, submission or negotiation of a covered Federal action.

(C) Requirements imposed by or pursuant to law as a condition for receiving a covered Federal award include those required by law or regulation and any other requirements in the actual award documents.

(D) Only those services expressly authorized by subdivisions (b)(3)(ii)(A)(1) and (2) of this clause are permitted under this clause.

(E) The reporting requirements of FAR 3.803(a) shall not apply with respect to payments of reasonable compensation made to regularly employed officers or employees of a person.

(c) Disclosure.

(1) The Contractor who requests or receives from an agency a Federal contract shall file with that agency a disclosure form, OMB standard form LLL, Disclosure of Lobbying Activities, if such person has made or has agreed to make any payment using nonappropriated funds (to include profits from any covered Federal action), which would be prohibited under subparagraph (b)(1) of this clause, if paid for with appropriated funds.

(2) The Contractor shall file a disclosure form at the end of each calendar quarter in which there occurs any event that materially affects the accuracy of the information contained in any disclosure form previously filed by such person under subparagraph (c)(1) of this clause. An event that materially affects the accuracy of the information reported includes--

(i) A cumulative increase of \$25,000 or more in the amount paid or expected to be paid for influencing or attempting to influence a covered Federal action; or

(ii) A change in the person(s) or individual(s) influencing or attempting to influence a covered Federal action; or

(iii) A change in the officer(s), employee(s), or Member(s) contacted to influence or attempt to influence a covered Federal action.

(3) The Contractor shall require the submittal of a certification, and if required, a disclosure form by any person who requests or receives any subcontract exceeding \$100,000 under the Federal contract.

(4) All subcontractor disclosure forms (but not certifications) shall be forwarded from tier to tier until received by the prime Contractor. The prime Contractor shall submit all disclosures to the Contracting Officer at the end of the calendar quarter in which the disclosure form is submitted by the subcontractor. Each subcontractor certification shall be retained in the subcontract file of the awarding Contractor.

(d) Agreement. The Contractor agrees not to make any payment prohibited by this clause.

(e) Penalties.

(1) Any person who makes an expenditure prohibited under paragraph (a) of this clause or who fails to file or amend the disclosure form to be filed or amended by paragraph (b) of this clause shall be subject to civil penalties as provided for by 31 U.S.C. 1352. An imposition of a civil penalty does not prevent the Government from seeking any other remedy that may be applicable.

(2) Contractors may rely without liability on the representation made by their subcontractors in the certification and disclosure form.

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(f) Cost allowability. Nothing in this clause makes allowable or reasonable any costs which would otherwise be unallowable or unreasonable. Conversely, costs made specifically unallowable by the requirements in this clause will not be made allowable under any other provision.

I.5 52.219-14 LIMITATIONS ON SUBCONTRACTING

DECEMBER 1996

(a) This clause does not apply to the unrestricted portion of a partial set-aside.

(b) By submission of an offer and execution of a contract, the Offeror/Contractor agrees that in performance of the contract in the case of a contract for--

(1) Services (except construction). At least 50 percent of the cost of contract performance incurred for personnel shall be expended for employees of the concern.

(2) Supplies (other than procurement from a nonmanufacturer of such supplies). The concern shall perform work for at least 50 percent of the cost of manufacturing the supplies, not including the cost of materials.

(3) General construction. The concern will perform at least 15 percent of the cost of the contract, not including the cost of materials, with its own employees.

(4) Construction by special trade contractors. The concern will perform at least 25 percent of the cost of the contract, not including the cost of materials, with its own employees.

I.6 52.239-01 PRIVACY OR SECURITY SAFEGUARDS

AUGUST 1996

(a) The Contractor shall not publish or disclose in any manner, without the Contracting Officer's written consent, the details of any safeguards either designed or developed by the Contractor under this contract or otherwise provided by the Government.-

(b) To the extent required to carry out a program of inspection to safeguard against threats and hazards to the security, integrity, and confidentiality of Government data, the Contractor shall afford the Government access to the Contractor's facilities, installations, technical capabilities, operations, documentation, records, and databases.-

(c) If new or unanticipated threats or hazards are discovered by either the Government or the Contractor, or if existing safeguards have ceased to function, the discoverer shall immediately bring the situation to the attention of the other party.

I.7 52.244-06 SUBCONTRACTS FOR COMMERCIAL ITEMS

MAY 2002

(a) Definitions. As used in this clause-

"Commercial item" has the meaning contained in the clause at 52.202-1, Definitions.

"Subcontract" includes a transfer of commercial items between divisions, subsidiaries, or affiliates of the Contractor or subcontractor at any tier.

(b) To the maximum extent practicable, the Contractor shall incorporate, and require its subcontractors at all tiers to incorporate, commercial items or nondevelopmental items as components of items to be supplied under this contract.

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(c)(1) The Contractor shall insert the following clauses in subcontracts for commercial items:

(i) 52.219-8, Utilization of Small Business Concerns (OCT 2000) (15 U.S.C. 637(d)(2) and (3)), in all subcontracts that offer further subcontracting opportunities. If the subcontract (except subcontracts to small business concerns) exceeds \$500,000 (\$1,000,000 for construction of any public facility), the subcontractor must include 52.219-8 in lower tier subcontracts that offer subcontracting opportunities.

(ii) 52.222-26, Equal Opportunity (APR 2002) (E.O. 11246).

(iii) 52.222-35, Equal Opportunity for Special Disabled Veterans, Veterans of the Vietnam Era, and Other Eligible Veterans (DEC 2001) (38 U.S.C. 4212(a)).

(iv) 52.222-36, Affirmative Action for Workers with Disabilities (JUN 1998) (29 U.S.C. 793).

(v) 52.247-64, Preference for Privately Owned U.S.-Flag Commercial Vessels (JUN 2000) (46 U.S.C. Appx 1241) (flowdown not required for subcontracts awarded beginning May 1, 1996).

(2) While not required, the Contractor may flow down to subcontracts for commercial items a minimal number of additional clauses necessary to satisfy its contractual obligations.

(d) The Contractor shall include the terms of this clause, including this paragraph (d), in subcontracts awarded under this contract.

(End of clause)

I.8 52.252-02 CLAUSES INCORPORATED BY REFERENCE

FEBRUARY 1998

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. Also, the full text of a clause may be accessed electronically at this/these address(es): www.arnet.gov

I.9 52.252-06 AUTHORIZED DEVIATIONS IN CLAUSES

APRIL 1984

(a) The use in this solicitation or contract of any Federal Acquisition Regulation (48 CFR Chapter 1) clause with an authorized deviation is indicated by the addition of "(DEVIATION)" after the date of the clause.

(b) The use in this solicitation or contract of any Commerce Acquisition Regulation clause with an authorized deviation is indicated by the addition of "(DEVIATION)" after the name of the regulation.

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SECTION J -- LIST OF DOCUMENTS, EXHIBITS AND OTHER ATTACHMENTS

J.1 ATTACHMENT LISTING

Attachment 1 - Hardware Listing

Hardware Listing

Component/Item	Assets per Component	Assets per Item	Maintenance Required Current/Future	Include Cost in Desktop Field Support (DFS) or Hardware (HW) Maintenance
CHECK READER	217			
WELCHALLYN/8300MICR		217	Current	DFS
CONTROL UNIT	8			
STORAGE TEK - Multiple Versions		5	Future	Not to be priced at this time
VTEL/LC3200		3	Future	Not to be priced at this time
CPU	14,041			
MICRON/133MHZ		7	Current	DFS
MICRON/166MHZ		12	Current	DFS
MICRON/180MHZ		4,033	Current	DFS
MICRON/200MHZ		11	Current	DFS
MICRON/266MHZ		1,068	Current	DFS
MICRON/300MHZ		1,782	Current	DFS
MICRON/400MHZ		78	Current	DFS
MICRON/450MHZ		2,260	Current	DFS
MICRON/550MHZ		310	Current	DFS
MICRON/600MHZ		339	Current	DFS
MICRON/650MHZ		437	Current	DFS
MICRON/733MHZ		605	Current	DFS
MICRON/933MHZ		2,946	Current	DFS
PROMARK/PT40/48666		153	Current	HW Maintenance
DISK ARRAY	6			
BAYDEL/DAR346D		3	Future	Not to be priced at this time
CORE/ARRAY2000		2	Future	Not to be priced at this time
STORAGETEK/9131001		1	Future	Not to be priced at this time
DVD TOWER	119			
CDINTERN/CDD1400		119	Current	HW Maintenance
HANDHELD HW	297			
PALM Devices - Multiple Versions/Manufacturers		123	Current	DFS
PSION Units		174	Future	Not to be priced at this time
HUB/CONCENTRATOR	510			
3COM - Multiple Versions		41	Future	Not to be priced at this time
CABLETRON - Multiple Versions		37	Future	Not to be priced at this time
CISCO - Multiple Versions		53	Future	Not to be priced at this time
FORE POWER HUB - Multiple Versions		251	Future	Not to be priced at this time
SHIVA/LANROVER		1	Future	Not to be priced at this time
STORAGE TEK - Multiple Versions		4	Future	Not to be priced at this time
SYNOPTICS - Multiple Versions		123	Future	Not to be priced at this time
JUKE/HDD	75			
KUBIK/CDR240M		31	Current Maintenance	HW Maintenance Include Cost in Desktop Field

Hardware Listing

Component/Item	Assets per Component	Assets per Item	Required Current/Future	Support (DFS) or Hardware (HW) Maintenance
NSM/CDR100XA		12	Current	HW Maintenance
NSM/MEN40		13	Current	HW Maintenance
PIONEER/5004X		3	Current	HW Maintenance
STARLINE/MERCURY205		16	Current	HW Maintenance
LAPTOP	615			
COMPAQ - Multiple Versions		25	Current	DFS
DELL - Multiple Versions		148	Current	DFS
GATEWAY - Multiple Versions		35	Current	DFS
HP/OMNIBOOK - Multiple Versions		28	Current	DFS
IBM - Multiple Versions		118	Current	DFS
MICRON - Multiple Versions		13	Current	DFS
NEC - Multiple Versions		64	Current	DFS
SONY - Multiple Versions		33	Current	DFS
TOSHIBA - Multiple Versions		151	Current	DFS
LIBRARY MGMT UNIT	4			
STORAGE TEK - Multiple Versions		4	Future	Not to be priced at this time
LIBRARY STORAGE UNIT	7			
STORAGE TEK - Multiple Versions		7	Future	Not to be priced at this time
MASS STORAGE UNIT	33			
EMC - Multiple Versions		29	Future	Not to be priced at this time
HP/XP256		2	Future	Not to be priced at this time
LAND5CORP/DS2000		2	Future	Not to be priced at this time
MONITOR	10,213			
ATI 17"		780	Current	DFS
ATI 15"		89	Current	DFS
CORNERSTONE 21"		83	Current	DFS
CTX 17"		2,025	Current	DFS
HITACHI 21"		5,413	Current	DFS
IYAMA 21"		1,531	Current	DFS
VIEWSONIC 21"		292	Current	DFS
PRINTER	10,833			
GENICOM - Multiple Versions		7	Current	HW Maintenance
HP/1100A		221	Current	DFS
HP/DESKJET - Multiple Versions		137	Current	DFS
HP/LASERJET - Multiple Versions		9,851	Current	DFS
ITHACA - Multiple Versions		422	Current	DFS
PROMARK		137	Current	HW Maintenance
QMS - Multiple Versions		39	Current	HW Maintenance
XEROX - Multiple Versions		19	Current	HW Maintenance
	Assets per	Assets per	Maintenance Required	Include Cost in Desktop Field Support (DFS) or Hardware

Hardware Listing

Component/Item	Componenet	Item	Current/Future	(HW) Maintenance
ROUTER	185			
3COM/NETBUILDERII		65	Future	Not to be priced at this time
CISCO - Multiple Versions		113	Future	Not to be priced at this time
NORTEL/P205446B		7	Future	Not to be priced at this time
SCANNER	302			
FUJITSU - Multiple Versions		104	Current	HW Maintenance
HP/SCANJET - Multiple Versions		136	Current	DFS
KODAK - Multiple Versions		62	Current	HW Maintenance
SERVER	648			
HP - Multiple Version (except 9000 series)		473	Future	Not to be priced at this time
HP/9000 - Multiple Versions		148	Future	Not to be priced at this time
SUN - Multiple Versions		27	Future	Not to be priced at this time
SWITCH	466			
CISCO - Multiple Versions		224	Future	Not to be priced at this time
FORE SYSTEM - Multiple Versions		63	Future	Not to be priced at this time
NORTEL - Multiple Versions		179	Future	Not to be priced at this time
TAPE DRIVE	44			
EXABYTE - Multiple Versions		11	Future	Not to be priced at this time
FUJITSU - Multiple Versions		16	Future	Not to be priced at this time
STORAGE TEK - Multiple Versions		17	Future	Not to be priced at this time

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

CONTRACT ID CODE

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1 of 3

1. IDENTIFICATION NO.	2. EFFECTIVE DATE 08/23/2002	3. REQUISITION/PURCHASE REQ. NO. PROC0100232	4. PROJECT NO. (If applicable)
-----------------------	---------------------------------	-------------------------------------------------	--------------------------------

5. ADMINISTERED BY (If other than Item 6)	6. CODE
Voice Information Patent and Trademark Office, 2011 Crystal Drive, Suite 810 Arlington, VA 22202	

7. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and Zip Code) Lawrick and Associates 900 Wisconsin Avenue, Suite 400 Bethesda, MD 20815	9A. AMENDMENT OF SOLICITATION NO.
	9B. DATED (SEE ITEM 11)
	(X) 10A. MODIFICATION OF CONTRACT/ORDER NO. 50PAPT201025
	(X) 10B. DATED (SEE ITEM 13) 07/03/2002

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers is extended, is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:

- (a) By completing Items 8 and 15, and returning _____ copies of the amendment;
 - (b) By acknowledging receipt of this amendment on each copy of the offer submitted;
 - (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers.
- FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (If required)

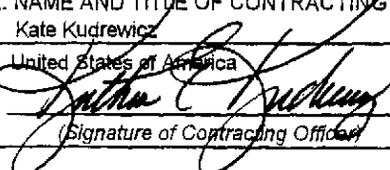
13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

<input type="checkbox"/>	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
<input type="checkbox"/>	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
<input type="checkbox"/>	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
<input type="checkbox"/>	D. OTHER (Specify type of modification and authority)

IMPORTANT: Contractor is not, is required to sign this document and return _____ copies to the issuing office.

DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)
Attached.

As provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

14. NAME AND TITLE OF SIGNER (Type or print)	15A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) Kate Kudrewicz
15. CONTRACTOR/OFFEROR	15B. United States of America
15C. DATE SIGNED	15D. BY 
15E. SIGNATURE OF PERSON AUTHORIZED TO SIGN	15F. DATE SIGNED 8/23/02

Item Summary	Document Number 50PAPT201 0001	Title FMEUS2	Page 2 of 3
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Funding:		\$0.00									
FYs	Fund	Budget Org	Sub	Object Class	Sub	Program	Cost Org	Sub	Proj/Job No.	Sub	Reporting Category
Division	Closed FYs	Cancelled Fund									

Item Number	Description	(Start Date to End Date)	Quantity	Unit of Issue	Unit Price	Total Cost (Includes Discounts)
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<i>Contract is for Facilities Management and End-User Support Services (FMEUS2).</i>						
Total Cost:						\$0.00

Measurement P.O.C. Kate Kudrewicz, (703) 305-8324. Program Office P.O.C. Tom King, (703) 305-8999. Contractor P.O.C. Carol Trawick, (301) 654-6088 Fax (301) 655-2251.

The purpose of this modification to contract number 50-PAPT-2-01025 is to incorporate a change in the period of performance of the contract. Accordingly, said contract is hereby modified as follows:

1. Modify Section B, Supplies or Services and Prices, specifically, Clause B.1, Schedule of Supplies or Services/Prices and Costs to reflect a change in the base period of performance from July 3, 2002 – July 2, 2003, to July 3, 2002 – June 30, 2003. Further, modify the period of performance of Option Period 1 – Option Period 9 to reflect a change from July 3, 20XX – July 2, 20XX to July 1, 20XX – June 30, 20XX. Replacement pages to Section B are hereby provided for incorporation into the subject contract. In summary the changes are as follows:
 - Remove pages 6-16 and replace with new pages 6-16 provided.
2. Modify Section F, Deliveries or Performance, specifically, Clause F.6, Period of Performance to reflect a change in the base period of performance from July 3, 2002 – July 2, 2003, to July 3, 2002 – June 30, 2003. Further, modify the period of performance of Option Period 1 – Option Period 9 to reflect a change from July 3, 20XX – July 2, 20XX to July 1, 20XX – June 30, 20XX. Replacement pages to Section F are hereby provided for incorporation into the subject contract. In summary the changes are as follows:
 - Remove page 37 and replace with new page 37 provided.
3. As a result of this modification the value of the contract does not change.

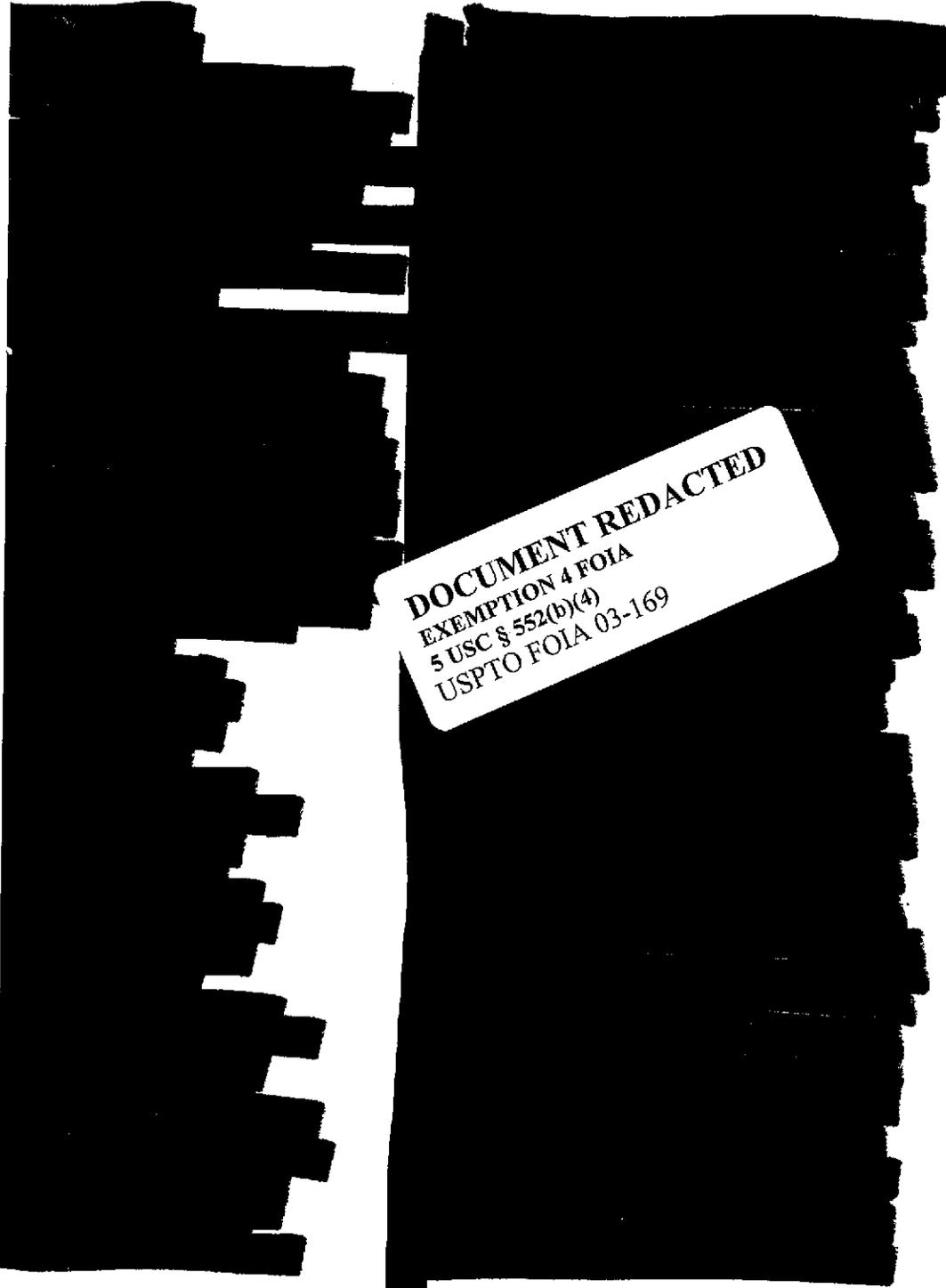
Except as provided herein, all other terms and conditions of the contract remain unchanged and in full force and effect.

SECTION B -- SUPPLIES OR SERVICES AND PRICES

B.1 SCHEDULE OF SUPPLIES OR SERVICES/PRICES AND COSTS

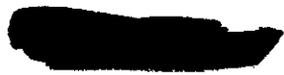
Base Period: July 3, 2002 - June 30, 2003

Labor Category	On-Site (Furniture)	On-Site (w/o Furniture)	Off-Site
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DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

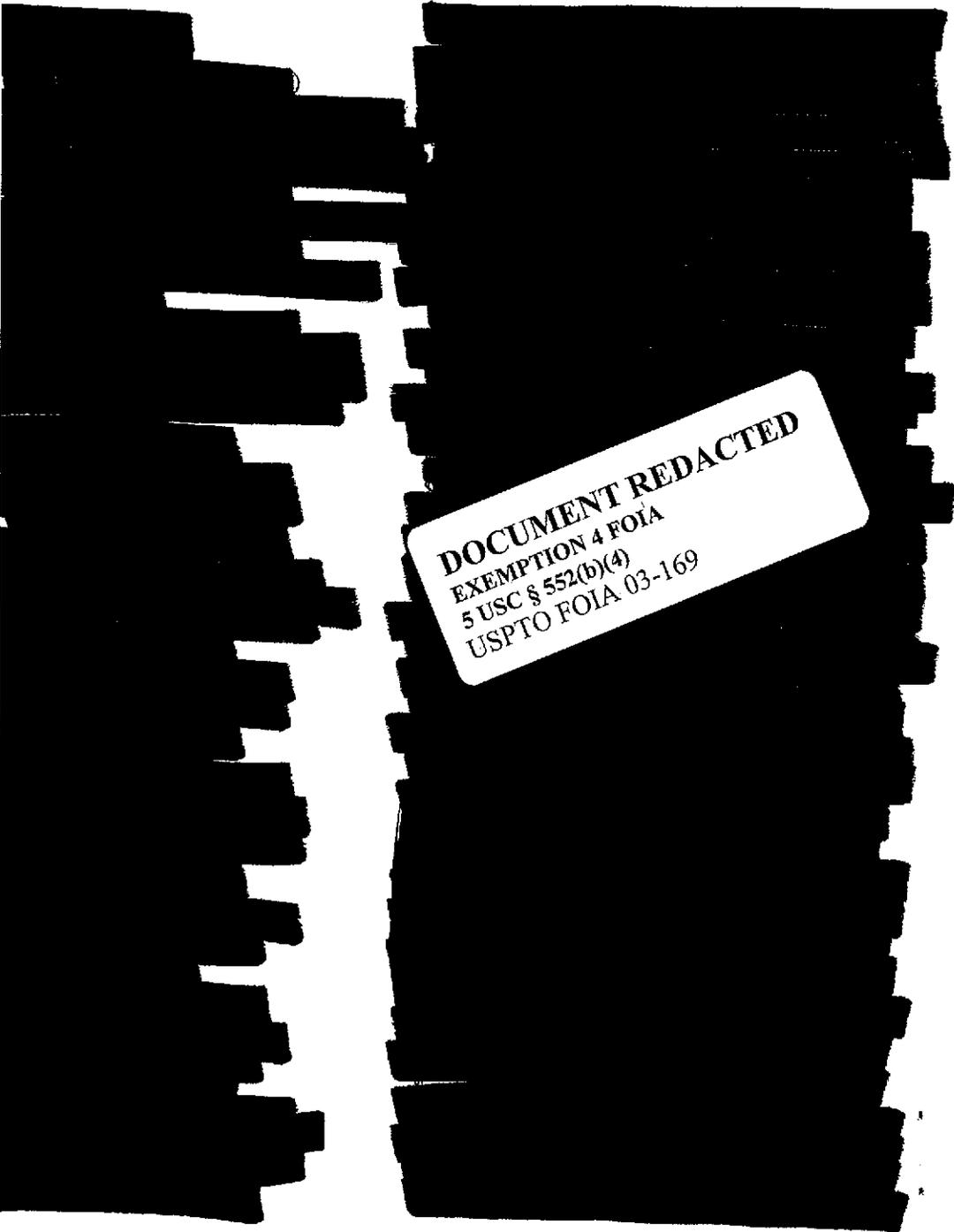
Other Direct Costs/Year
Including Rent, Utilities and Maintenance



B.2 OPTION PERIOD 1

Option Period 1: July 1, 2003 - June 30, 2004

Labor Category	On-Site (Furniture)	On-Site (w/o Furniture)	Off-Site
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EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

[REDACTED]

Other Direct Costs/Year
Including Rent, Utilities and Maintenance [REDACTED]

B.3 OPTION PERIOD 2

Option Period 2: July 1, 2004 - June 30, 2005

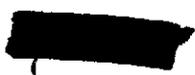
Labor Category	On-Site (Furniture)	On-Site (w/o Furniture)	Off-Site
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[REDACTED]

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169



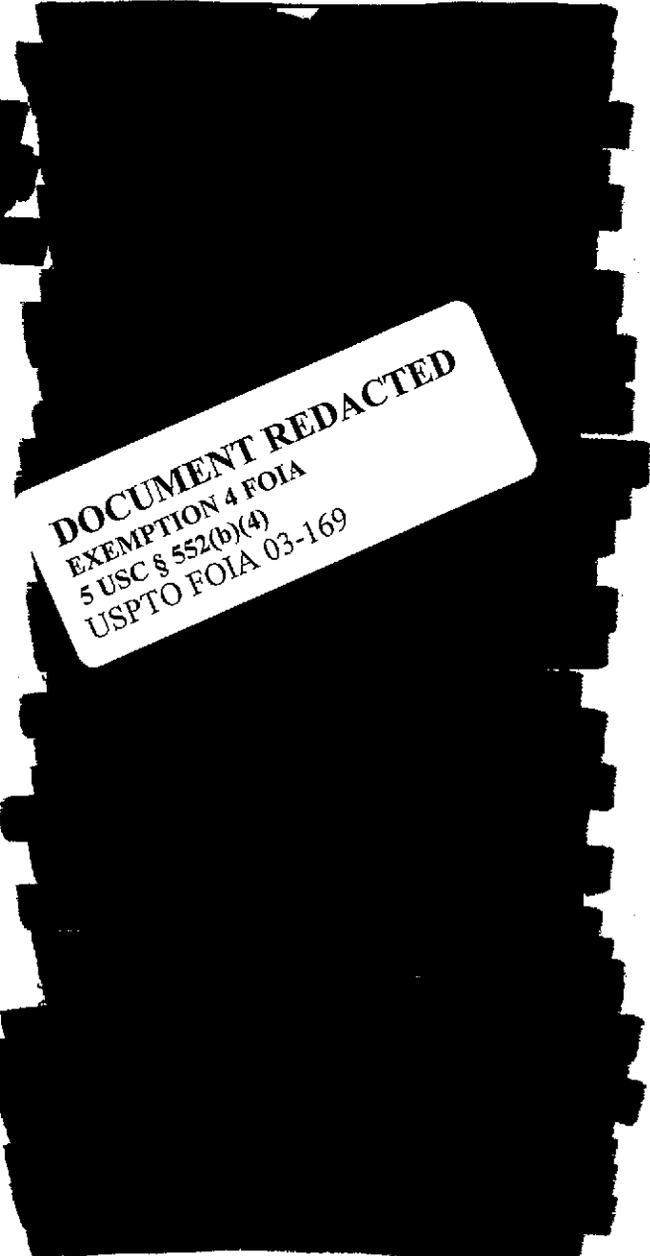
Other Direct Costs/Year
Including Rent, Utilities and Maintenance



B.4 OPTION PERIOD 3

Option Period 3: July 1, 2005 - June 30, 2006

Labor Category	On-Site (Furniture)	On-Site (w/o Furniture)	Off-Site
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EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

[REDACTED]

[REDACTED]

Other Direct Costs/Year Including Rent, Utilities and Maintenance

[REDACTED]

B.5 OPTION PERIOD 4

Option Period 4: July 1, 2006 - June 30, 2007

Labor Category	On-Site (Furniture)	On-Site (w/o Furniture)	Off-Site
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[REDACTED]

[REDACTED]

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EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

[REDACTED]

Other Direct Costs/Year
Including Rent, Utilities and Maintenance [REDACTED]

B.6 OPTION PERIOD 5

Option Period 5: July 1, 2007 - June 30, 2008

Labor Category	On-Site (Furniture)	On-Site (w/o Furniture)	Off-Site
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[REDACTED]

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

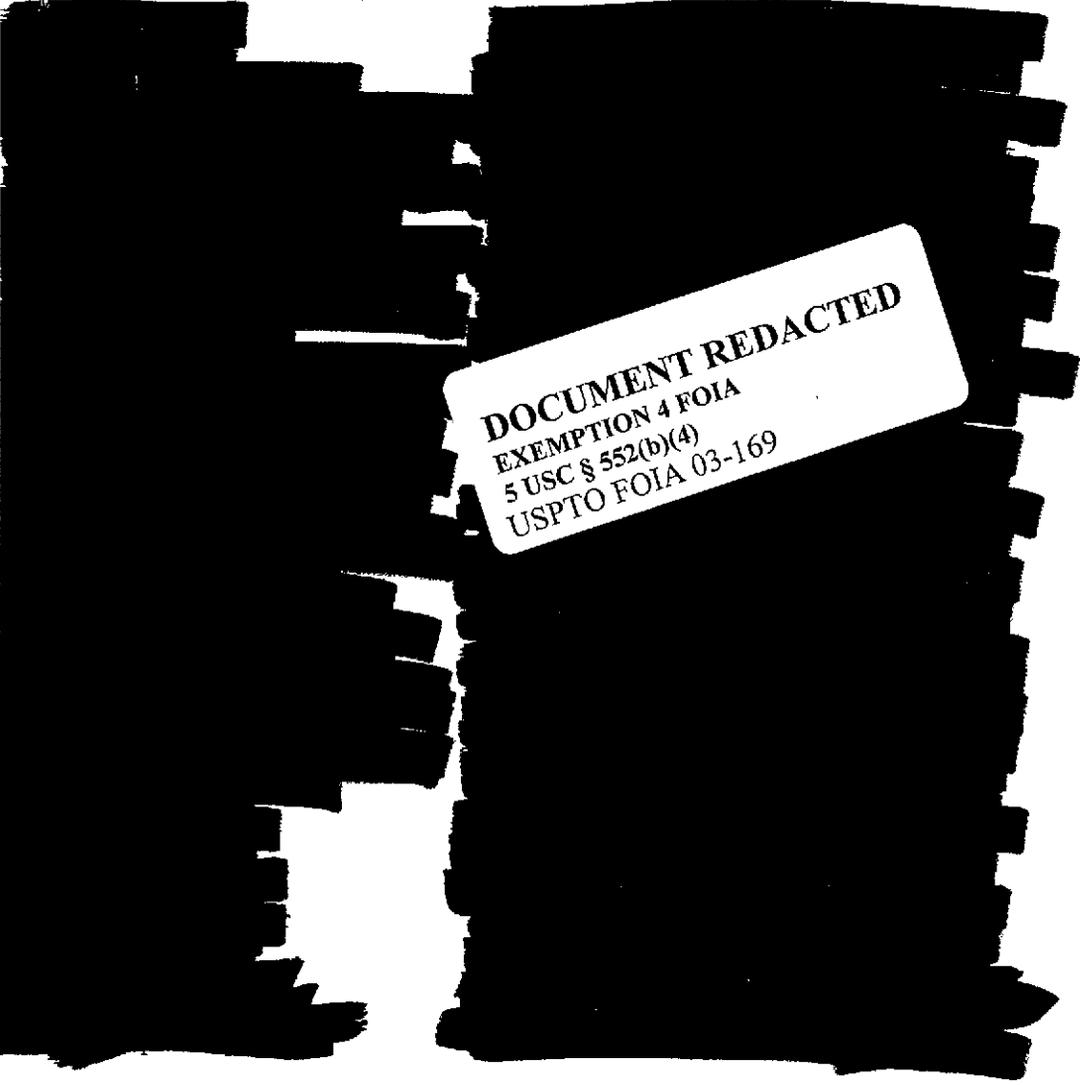


Other Direct Costs/Year
Including Rent, Utilities and Maintenance

B.7 OPTION PERIOD 6

Option Period 6: July 1, 2008 - June 30, 2009

Labor Category	On-Site (Furniture)	On-Site (w/o Furniture)	Off-Site
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EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

[REDACTED]

Other Direct Costs/Year
Including Rent, Utilities and Maintenance [REDACTED]

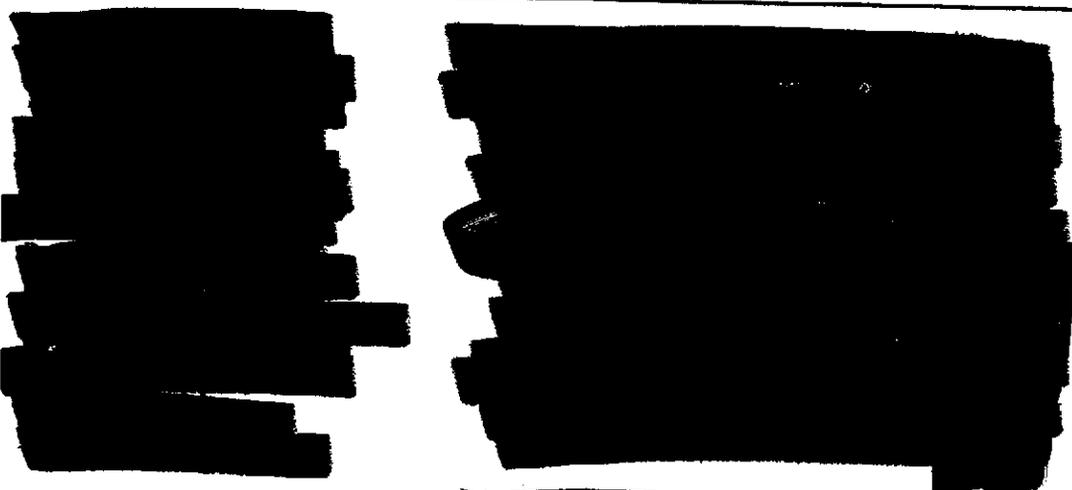
B.8 OPTION PERIOD 7

Option Period 7: July 1, 2009 - June 30, 2010

Labor Category	On-Site (Furniture)	On-Site (w/o Furniture)	Off-Site
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[REDACTED]

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

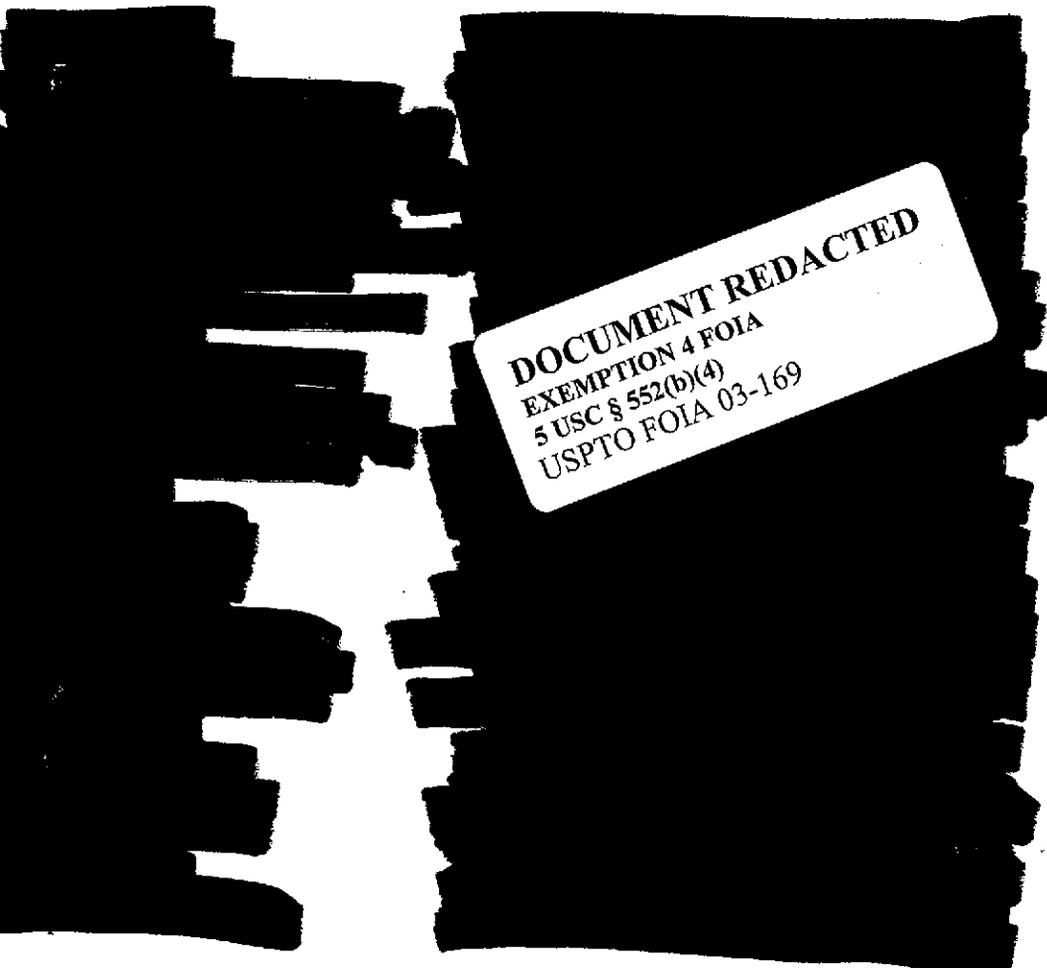


Other Direct Costs/Year
Including Rent, Utilities and Maintenance

B.9 OPTION PERIOD 8

Option Period 8: July 1, 2010 - June 30, 2011

Labor Category	On-Site (Furniture)	On-Site (w/o Furniture)	Off-Site
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[REDACTED]

her Direct Costs/Year
Including Rent, Utilities and Maintenance

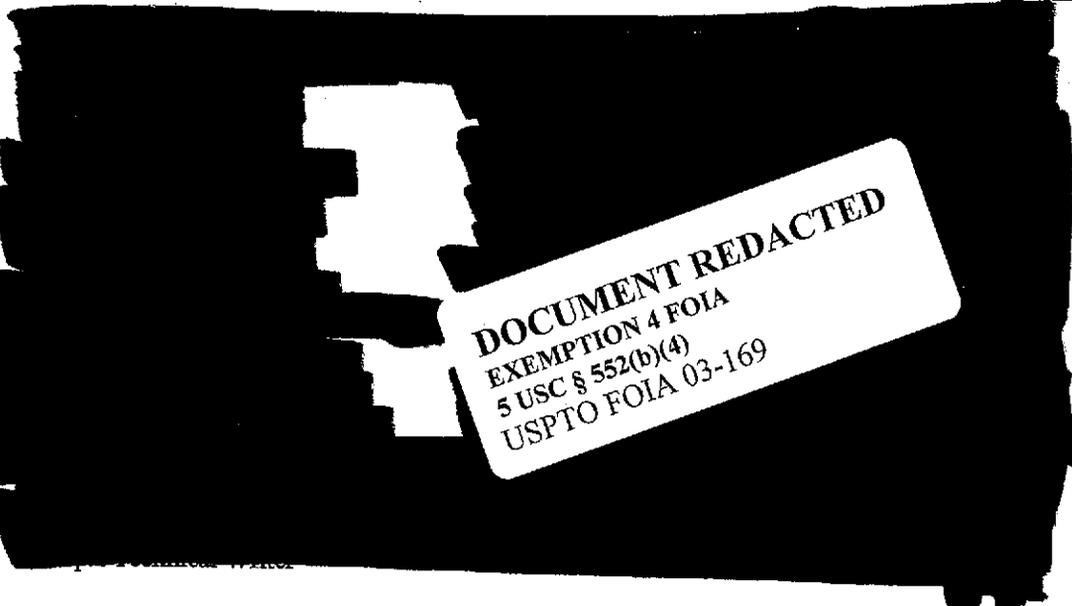
B.10 OPTION PERIOD 9

Option Period 9: July 1, 2011 - June 30, 2012

Labor Category	On-Site (Furniture)	On-Site (w/o Furniture)	Off-Site
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[REDACTED]

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169



Other Direct Costs/Year
Including Rent, Utilities and Maintenance

B.11 CEILING PRICE

B.1 The ceiling price of this contract is \$ 160,278,603.61. The Contractor shall not make expenditures or incur obligations in the performance of this contract which exceed the ceiling price specified herein, except at the Contractor's own risk. The Government shall not be liable for any costs incurred in excess of \$ 160,278,603.61.

B.2 Notwithstanding the ceiling price for this contract, the Government shall not be liable for any costs incurred in excess of the amount contained in each task order issued under this contract. Each task order shall be independent. The Contractor shall not exceed the amount contained in the applicable task order for performance under the applicable task order.

B.3 The Contractor shall not invoice at rates in excess of the hourly rates specified in the schedule in Section B.

B.4 If at any time during the performance of any task order, the Contractor has reason to believe that the total price to the Government to complete the task order will be greater than the authorized ceiling amount, the Contractor shall notify the Contracting Officer, giving a revised estimate of the total price for performing the task and giving supporting documentation.

B.12 OTHER DIRECT COSTS

All other direct costs associated with this contract shall be authorized by the Contracting Officer (CO). Other direct costs include all direct costs of a task order which are not attributable to the labor categories provided above. Other direct costs shall be reimbursed on a time and materials basis unless otherwise negotiated prior to issuance of any task order. Any travel costs associated with this contract, if applicable, shall be in accordance with the Federal Travel Regulations.

Award/Contract Modification	Document 50PAPT201025/0001	Document Title FMEUS2	Page 37 of 56
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The Contractor shall comply with the aforementioned Government holidays and any other day designated by Federal Statute, Executive Order, or Presidential proclamation, therefore, the Government offices are closed to the Contractor's staff on the day(s) these holidays are observed. In addition, work may not be required of the Contractor when Federal employees are released from work early due to inclement weather conditions or when Federal offices are closed due to inclement weather conditions. The COTR will notify the Contractor when early release of Federal employees has been authorized.

F.5 MONTHLY STATUS REPORT

The Contractor shall submit a monthly status report, covering the first day of the month through the last day of the month. One (1) copy each of the status report is due, in electronic format, to the COTR and the CO seven (7) working days following the last day of the month. The format for the status report shall include a contract summary sheet to include the contract number and title, a task by task status report, a summary of problems, and a summary of expenditures. Each task in progress shall be summarized to identify the Task Order Manager for both the USPTO and the Contractor, the task objective, progress, planned activities, information about deliverable status, and problems. The problem summary section shall describe any problems and proposed solutions, if applicable, and problem resolutions. The expenditures section shall summarize tabularly and/or graphically estimated costs and labor hours, overall and by task. Data shall include:

- (1) Labor hours and dollar amounts expended for each labor category from the effective date of the contract thru the last day of the current reporting month;
- (2) Labor hours and dollar amount expended by category during the current reporting month;
- (3) Estimates of labor hours (by category) to be expended during the next reporting month; and
- (4) Identification of direct labor hours of prime Contractor and subcontractor(s), if applicable.

In addition to the monthly status report, the COTR will have the Contractor generate other reports as necessary.

F.6 PERIOD OF PERFORMANCE

The period of performance of this contract is as follows:

- Base Year: July 3, 2002 - June 30, 2003
- Option Year 1: July 1, 2003 - June 30, 2004
- Option Year 2: July 1, 2004 - June 30, 2005
- Option Year 3: July 1, 2005 - June 30, 2006
- Option Year 4: July 1, 2006 - June 30, 2007
- Option Year 5: July 1, 2007 - June 30, 2008
- Option Year 6: July 1, 2008 - June 30, 2009
- Option Year 7: July 1, 2009 - June 30, 2010
- Option Year 8: July 1, 2010 - June 30, 2011
- Option Year 9: July 1, 2011 - June 30, 2012

F.7 PLACE OF DELIVERY

The deliverable items to be furnished hereunder shall be delivered to the COTR as named in Section G of the contract.

F.8 PLACE OF PERFORMANCE

The effort required under this contract shall be performed at the USPTO currently located in Arlington, VA, the Contractor's facilities and/or other sites designated by the USPTO. Each task order will specify the place of performance.

AMENDMENT/MODIFICATION NO. 002	3. EFFECTIVE DATE 03/05/2003	4. REQUISITION/PURCHASE REQ. NO. PROC0100232	5. PROJECT NO. (If applicable)
-----------------------------------	---------------------------------	-------------------------------------------------	--------------------------------

ISSUED BY Invoice Information Patent and Trademark Office, 2011 Crystal Drive, Suite 810 Arlington, VA 22202	CODE 17	7. ADMINISTERED BY (If other than Item 6)	CODE
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NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and Zip Code) Lawrick and Associates 300 Wisconsin Avenue, Suite 400 Bethesda, MD 20815	FACILITY CODE	9A. AMENDMENT OF SOLICITATION NO.
		9B. DATED (SEE ITEM 11)
		(X) 10A. MODIFICATION OF CONTRACT/ORDER NO. 50PAPT201025
		(X) 10B. DATED (SEE ITEM 13) 07/03/2002

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers is extended, is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:
 (a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

ACCOUNTING AND APPROPRIATION DATA (If required)
 - - A - - - - -

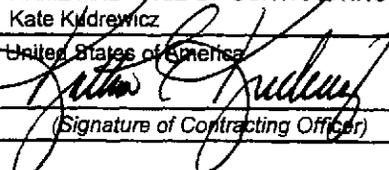
**13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS.
IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.**

ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
	D. OTHER (Specify type of modification and authority) Option Clause of the Contract.

IMPORTANT: Contractor is not, is required to sign this document and return _____ copies to the issuing office.

DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)
 Attached.

as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

NAME AND TITLE OF SIGNER (Type or print)	16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) Kate Kildrewicz
CONTRACTOR/OFFEROR	15C. DATE SIGNED
Signature of person authorized to sign	16B. United States of America BY  (Signature of Contracting Officer)
	16C. DATE SIGNED 3/5/03

Item Summary	Document Number 50PAP...1025/0002	Title FMEUS2	Page 2 of 3
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Total Funding: \$0.00

FYS	Fund	Budget Org	Sub	Object Class	Sub	Program	Cost Org	Sub	Proj/Job No.	Sub	Reporting Category	
Status	Closed FYs	Cancelled Fund										

Item Number	Description	(Start Date to End Date)	Quantity	Unit of Issue	Unit Price	Total Cost (Includes Discounts)
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contract is for Facilities Management and End-User Support Services (FMEUS2).

Total Cost: 50.00

urement P.O.C. Kate Kudrewicz, (703) 305-8324. Program Office P.O.C. Tom King, (703) 305-8999. Contractor P.O.C. Carol Trawick, (301) 654-6088 Fax (301) 655-2251.

The purpose of this modification to contract number 50-PAPT-2-01025 is to, exercise Option Period One, incorporate additional labor categories into Section B, and incorporate a new clause in Section H. Accordingly, said contract is hereby modified as follows:

1. In accordance with clause H.11 entitled, Option to Extend the Term of the Contract, and the letter dated January 16, 2003, providing preliminary notice of the Government's intention to exercise the first option period of the contract, the Government hereby exercises that option. The effective date of option period one will be from July 1, 2003 through June 30, 2004 thus extending the period of performance of the contract.
2. Modify Section B, Supplies or Services and Prices, specifically, Clauses B.1 – B10, to reflect the incorporation of three additional labor categories for the base period and all option periods. Replacement pages to Section B are hereby provided as an attachment to this modification for incorporation into the subject contract.
3. Modify Section H, Special Contract Requirements, to add a new Clause H.20 entitled, IT Security Requirements for Unclassified Information Technology Resources. Replacement pages to Section H are hereby provided for incorporation into the subject contract.

Except as provided herein, all other terms and conditions of the contract remain unchanged and in full force and effect.

SECTION B -- SUPPLIES OR SERVICES AND PRICES

B.1 SCHEDULE OF SUPPLIES OR SERVICES/PRICES AND COSTS

Base Period: July 3, 2002 - June 30, 2003

<u>Labor Category</u>	<u>On-Site (Furniture)</u>	<u>On-Site (w/o Furniture)</u>	<u>Off-Site</u>
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DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

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Other Direct Costs/Year
Including Rent, Utilities and Maintenance

B.2 OPTION PERIOD 1

Option Period 1: July 1, 2003 - June 30, 2004

Labor Category	On-Site (Furniture)	On-Site (w/o Furniture)	Off-Site
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EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

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Other Direct Costs/Year
Including Rent, Utilities and Maintenance

B.3 OPTION PERIOD 2

Option Period 2: July 1, 2004 - June 30, 2005

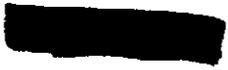
Labor Category

On-Site (Furniture) On-Site (w/o Furniture) Off-Site

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

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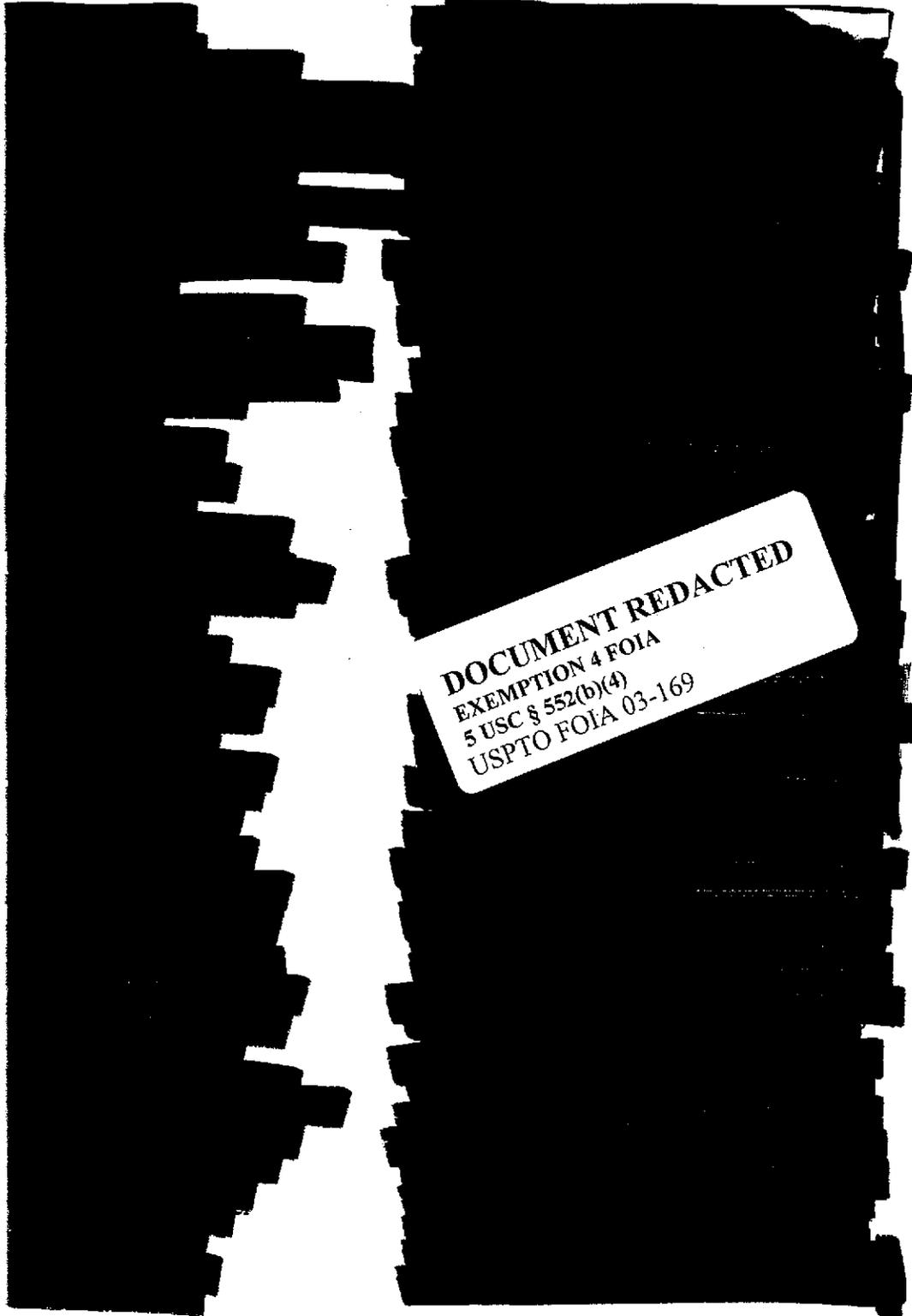
Other Direct Costs/Year
Including Rent, Utilities and Maintenance



B.4 OPTION PERIOD 3

Option Period 3: July 1, 2005 - June 30, 2006

Labor Category	On-Site (Furniture)	On-Site (w/o Furniture)	Off-Site
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EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

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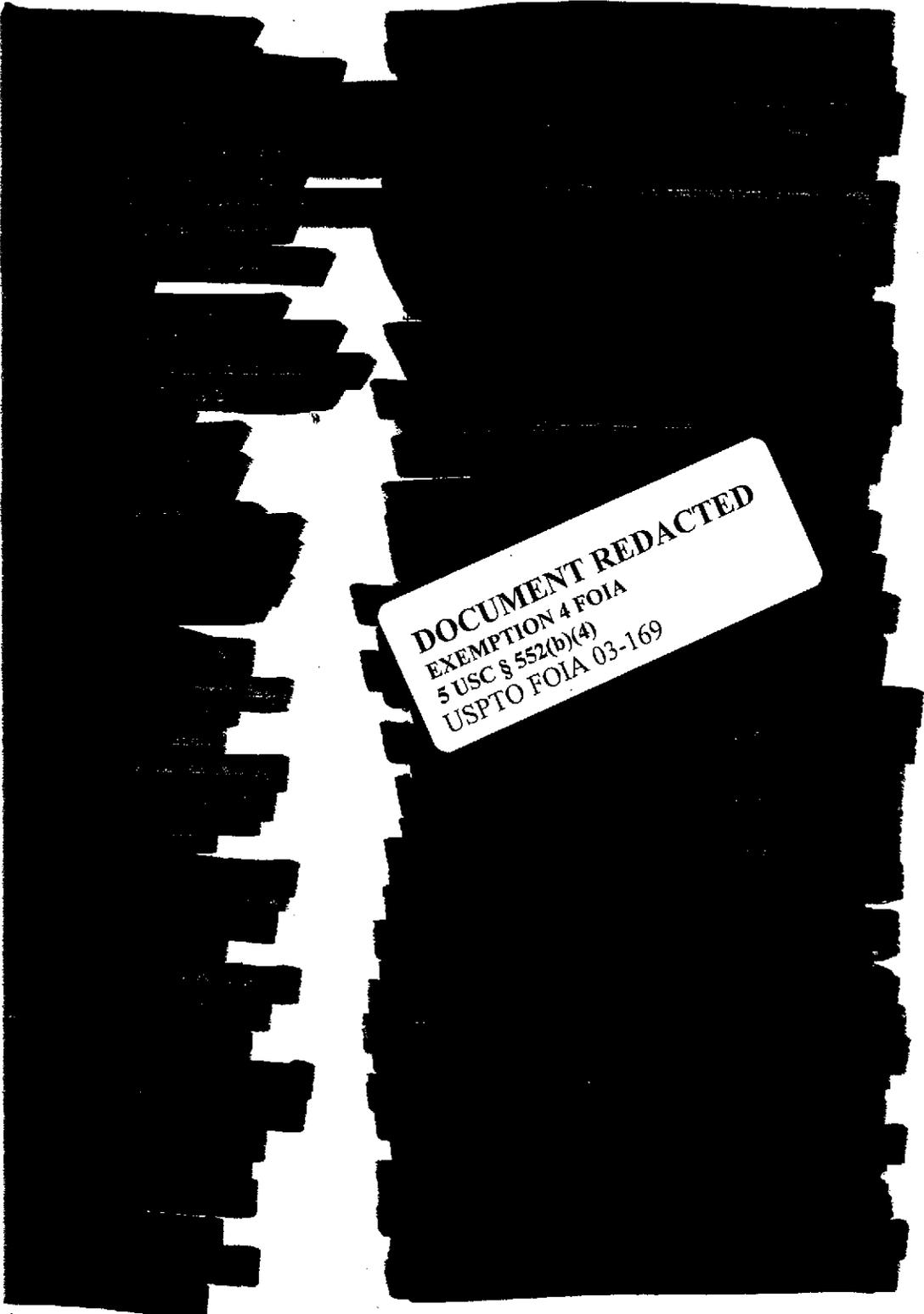
Other Direct Costs/Year
Including Rent, Utilities and Maintenance



B.5 OPTION PERIOD 4

Option Period 4: July 1, 2006 - June 30, 2007

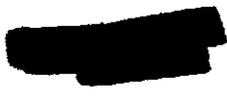
Labor Category	On-Site (Furniture)	On-Site (w/o Furniture)	Off-Site
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EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

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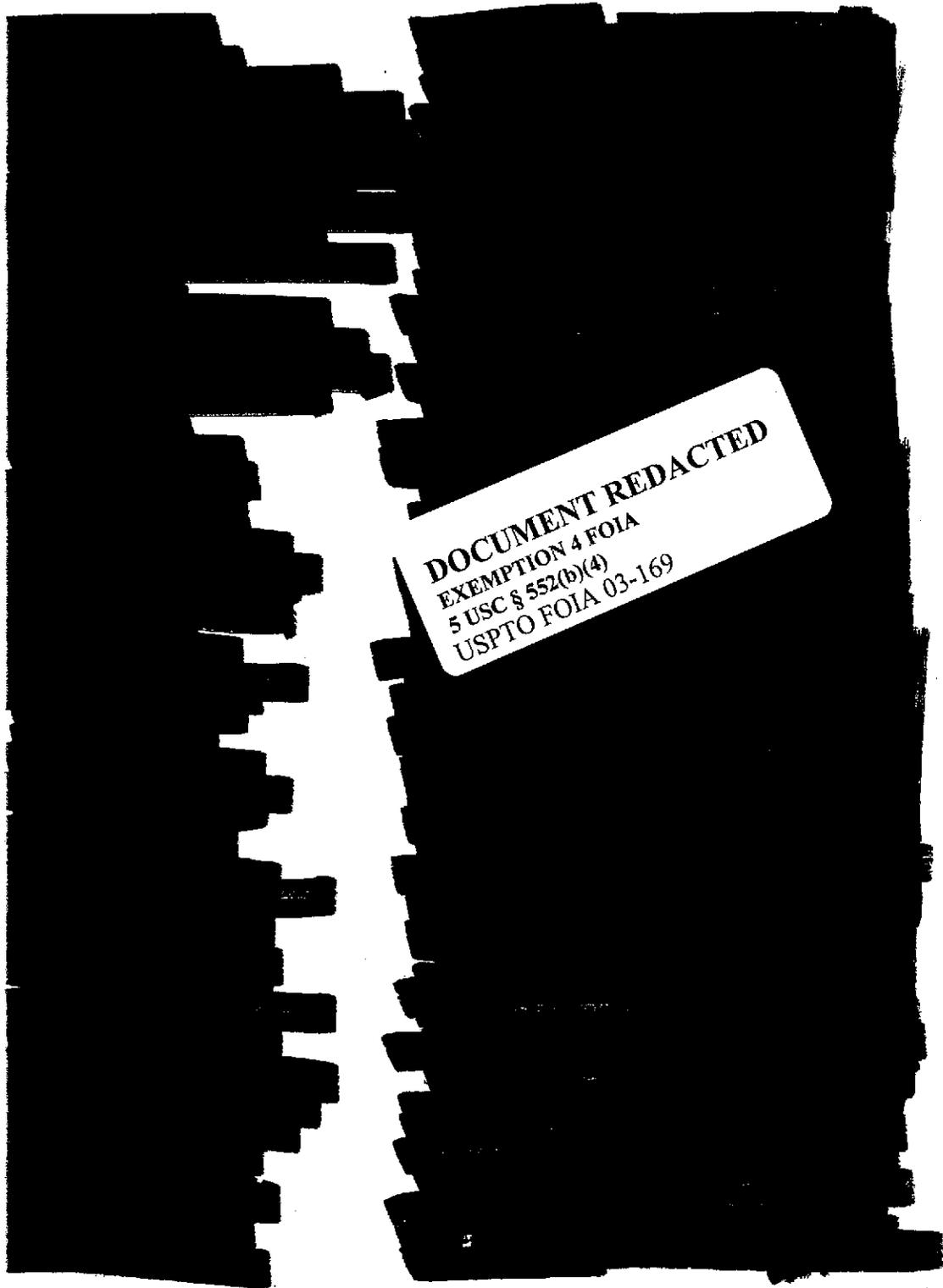
Other Direct Costs/Year
Including Rent, Utilities and Maintenance



B.6 OPTION PERIOD 5

Option Period 5: July 1, 2007 - June 30, 2008

Labor Category On-Site On-Site Off-Site
(Furniture) (w/o Furniture)



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EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

Award/Contract Modification	Document No. 50PAPT201025/0002	Document Title FMEUS2	Page 12 of 54
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Other Direct Costs/Year
Including Rent, Utilities and Maintenance

B.7 OPTION PERIOD 6

Option Period 6: July 1, 2008 - June 30, 2009

Labor Category	On-Site (Furniture)	On-Site (w/o Furniture)	Off-Site
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[REDACTED]	[REDACTED]	[REDACTED]
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DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

[REDACTED]

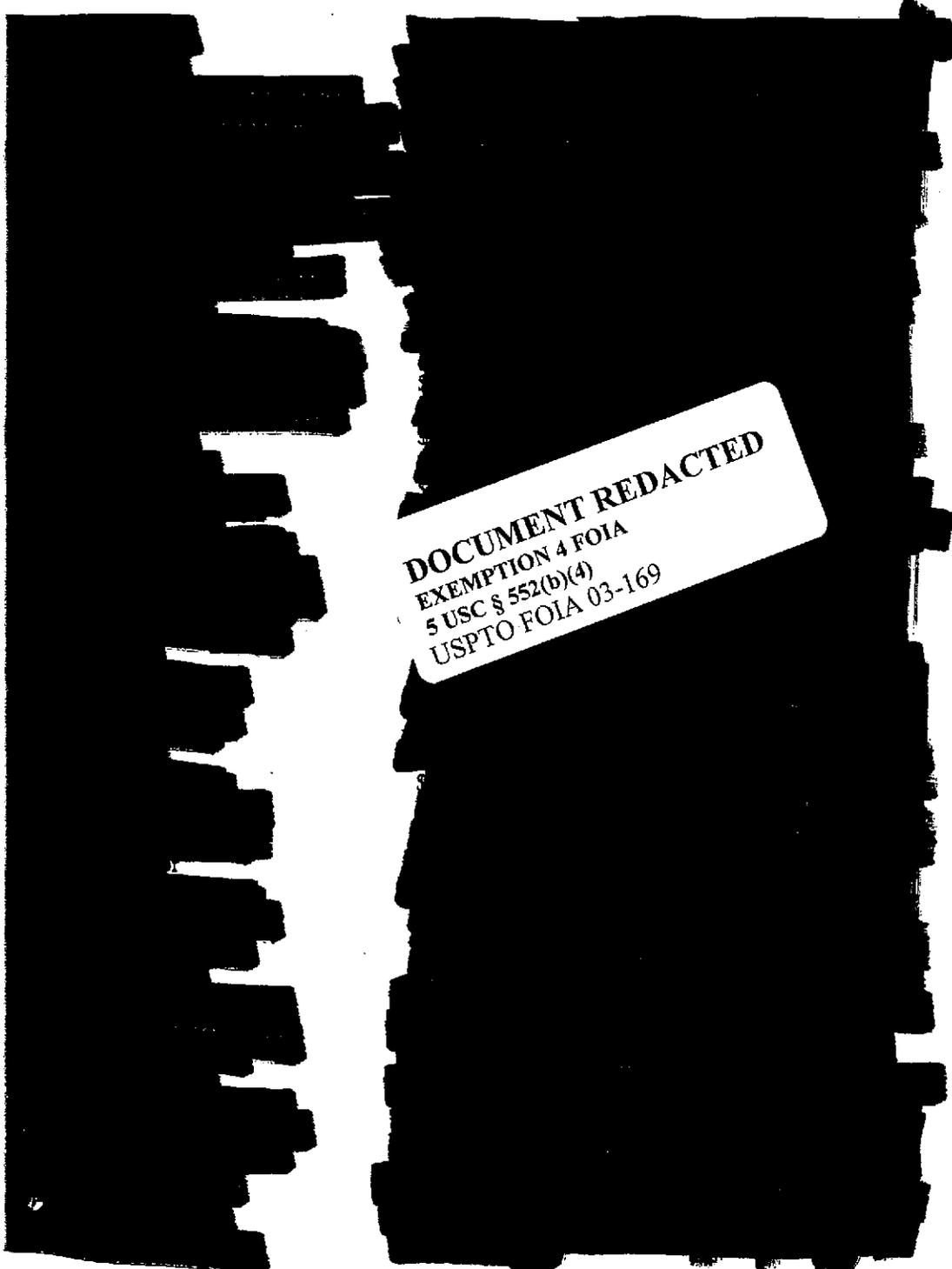
Other Direct Costs/Year
Including Rent, Utilities and Maintenance

B.8 OPTION PERIOD 7

Option Period 7: July 1, 2009 - June 30, 2010

On-Site On-Site
(Furniture) (w/o Furniture) Off-Site

Labor Category



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EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

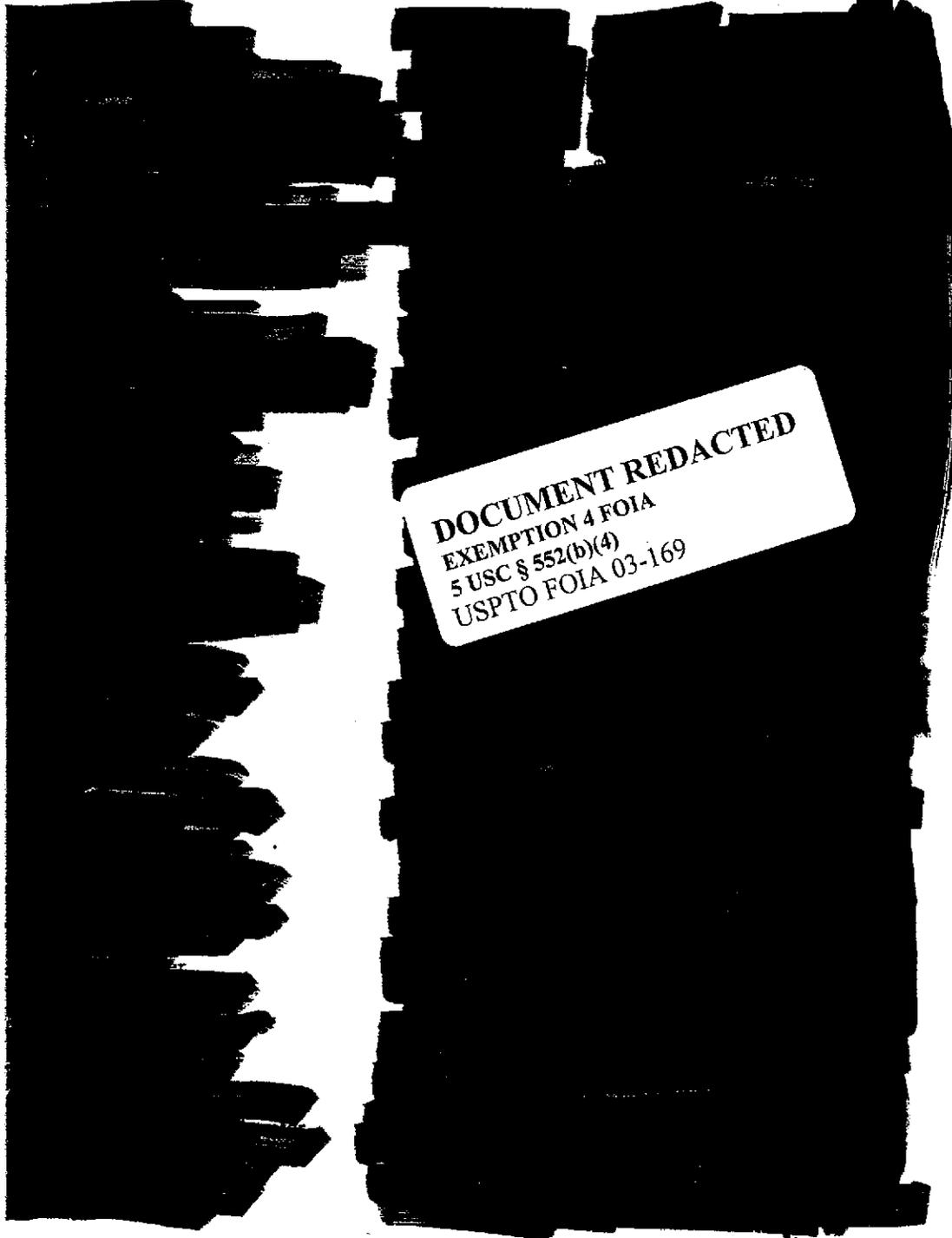
Other Direct Costs/Year
Including Rent, Utilities and Maintenance

B.9 OPTION PERIOD 8

Option Period 8: July 1, 2010 - June 30, 2011

Labor Category

On-Site (Furniture) On-Site (w/o Furniture) Off-Site



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EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

[REDACTED]

Other Direct Costs/Year
Including Rent, Utilities and Maintenance

B.10 OPTION PERIOD 9

Option Period 9: July 1, 2011 - June 30, 2012

Labor Category

On-Site On-Site
(Furniture) (w/o Furniture) Off-Site

[REDACTED TABLE CONTENT]

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EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

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DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

Other Direct Costs/Year
Including Rent, Utilities and Maintenance

B.11 CEILING PRICE

B.1 The ceiling price of this contract is \$ 160,278,603.61. The Contractor shall not make expenditures or incur obligations in the performance of this contract which exceed the ceiling price specified herein, except at the Contractor's own risk. The Government shall not be liable for any costs incurred in excess of \$ 160,278,603.61.

B.2 Notwithstanding the ceiling price for this contract, the Government shall not be liable for any costs incurred in excess of the amount contained in each task order issued under this contract. Each task order shall be independent. The Contractor shall not exceed the amount contained in the applicable task order for performance under the applicable task order.

B.3 The Contractor shall not invoice at rates in excess of the hourly rates specified in the schedule in Section B.

B.4 If at any time during the performance of any task order, the Contractor has reason to believe that the total price to the Government to complete the task order will be greater than the authorized ceiling amount, the Contractor shall notify the Contracting Officer, giving a revised estimate of the total price for performing the task and giving supporting documentation.

B.12 OTHER DIRECT COSTS

All other direct costs associated with this contract shall be authorized by the Contracting Officer (CO). Other direct costs include all direct costs of a task order which are not attributable to the labor categories provided above. Other direct costs shall be reimbursed on a time and materials basis unless otherwise negotiated prior to issuance of any task order. Any travel costs associated with this contract, if applicable, shall be in accordance with the Federal Travel Regulations.

Award/Contract Modification	Document No. 50PAPT201025/0002	Document Title FMEUS2	Page 47 of 56 a
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H.20 IT SECURITY REQUIREMENTS FOR UNCLASSIFIED IT RESOURCES

IT SECURITY REQUIREMENTS FOR UNCLASSIFIED INFORMATION TECHNOLOGY RESOURCES

a) This clause is applicable to all or any part of the contract that includes information technology resources or services in which the Contractor must have physical or electronic access to USPTO's sensitive information contained in unclassified systems that directly support the mission of the Agency. This includes information technology, hardware, software, and the management, operation, maintenance, programming, and system administration of computer systems, networks, and telecommunications systems.

b) Within 30 days of contract award, the Contractor shall certify in writing to the COTR that its employees, in performance of the contract, have completed:

- 1) USPTO IT Security User Awareness Training
- 2) Annual IT Security training in USPTO IT Security policies, procedures, computer ethics, and best practices (when available).

The contractor may use web-based training as available from USPTO to meet these requirements. For contracts extending beyond one year, the Contractor shall certify in writing to the COTR within the first 30 days of each contract or option year subsequent to the award year that its employees, in performance of the contract, have completed annual IT Security User Awareness training in accordance with USPTO requirements.

c) All Contractor employees are expected to comply with USPTO's IT Security policies.

d) The Contractor shall incorporate the substance of this clause in all subcontracts that meet the conditions in paragraph (a) of this clause

(End of clause)

2. AMENDMENT/MODIFICATION NO. 0003	3. EFFECTIVE DATE 12/11/2003	4. REQUISITION/PURCHASE REQ. NO. PROC0100232	5. PROJECT NO. (if applicable)
6. ISSUED BY No Invoice Information U.S. Patent and Trademark Office, 2011 Crystal Drive, Suite 810 Arlington, VA 22202		7. ADMINISTERED BY (if other than item 6)	

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and Zip Code) Trawick and Associates 6900 Wisconsin Avenue, Suite 400 Bethesda, MD 20815	9A. AMENDMENT OF SOLICITATION NO.
	9B. DATED (SEE ITEM 11)
	(X) 10A. MODIFICATION OF CONTRACT/ORDER NO. 50PAPT201025
CODE * FACILITY CODE	(X) 10B. DATED (SEE ITEM 13) 07/03/2002

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

The above numbered solicitation is amended as set forth in item 14. The hour and date specified for receipt of Offers is extended, is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:
 (a) By completing items 8 and 15, and returning _____ copies of the amendment (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (if required)

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
<input type="checkbox"/>	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation data, etc.) SET FORTH IN ITEM 14. PURSUANT TO THE AUTHORITY OF FAR 43.105(b).
<input checked="" type="checkbox"/>	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF: The Changes Clause of the Contract.
<input type="checkbox"/>	D. OTHER (Specify type of modification and authority)

E. IMPORTANT: Contractor is not, is required to sign this document and return _____ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

The purpose of this modification to contract number 80-PAPT-2-01025 is to incorporate into Section B changes to unit prices that were clerical errors, add to Section H, security clauses, CAR 1352.239-73- Security Requirements for Information Technology Resources and CAR 1352.239-74 Security Processing Requirements for Contractor/Subcontractor Personnel for Accessing DOC Information Technology System and to Section I, Central Contractor Registration clause number 52.204-7 (Alt 1). This modification results in no change to the contract ceiling. For convenience the attached is a new copy of the contract for ease of incorporation. All other terms and conditions of the contract remain unchanged.

Except as provided herein, all terms and conditions of the document referenced in item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print) CAROL TRAWICK	16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) Kala Kudrewicz
15B. CONTRACTOR/OFFEROR (Signature of person authorized to sign)	15C. DATE SIGNED 12/17/03
16B. United States of America BY	16C. DATE SIGNED 12/17/2003

Line Item Summary	Docu mber 50PAPT201025/0003	Title FMBUS2	Page 2 of 60
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Line Item Number	Description	Delivery Date (Start date to End date)	Quantity	Unit of Issue	Unit Price	Total Cost
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This contract is for Facilities Management and End-User Support Services (FMEUS2). This is modification MO03 to Contract No. 50-PAPT-2-01025.

No Changed Line Item Fields

Previous Total: \$0.00
Modification Total: \$0.00
Grand Total: \$0.00

Procurement P.O.C. Kate Kudrewicz, (703) 305-8324. Program Office P.O.C. Tom King, (703) 305-8999. Contractor P.O.C. Carol Trawick, (301) 654-6088. Fax (301) 655-2251.

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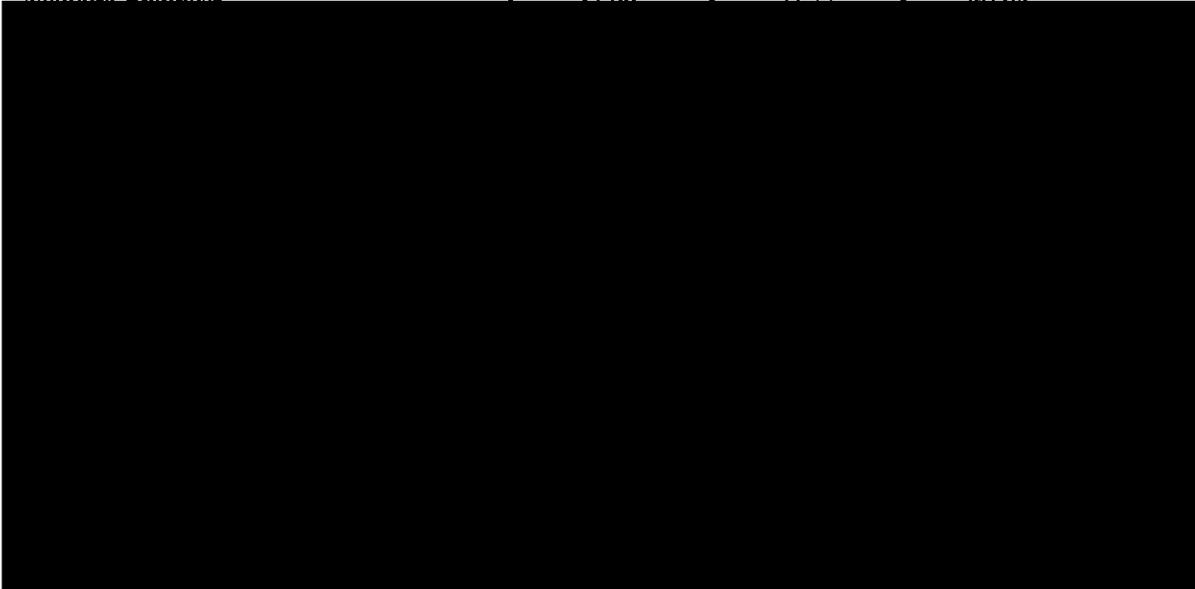
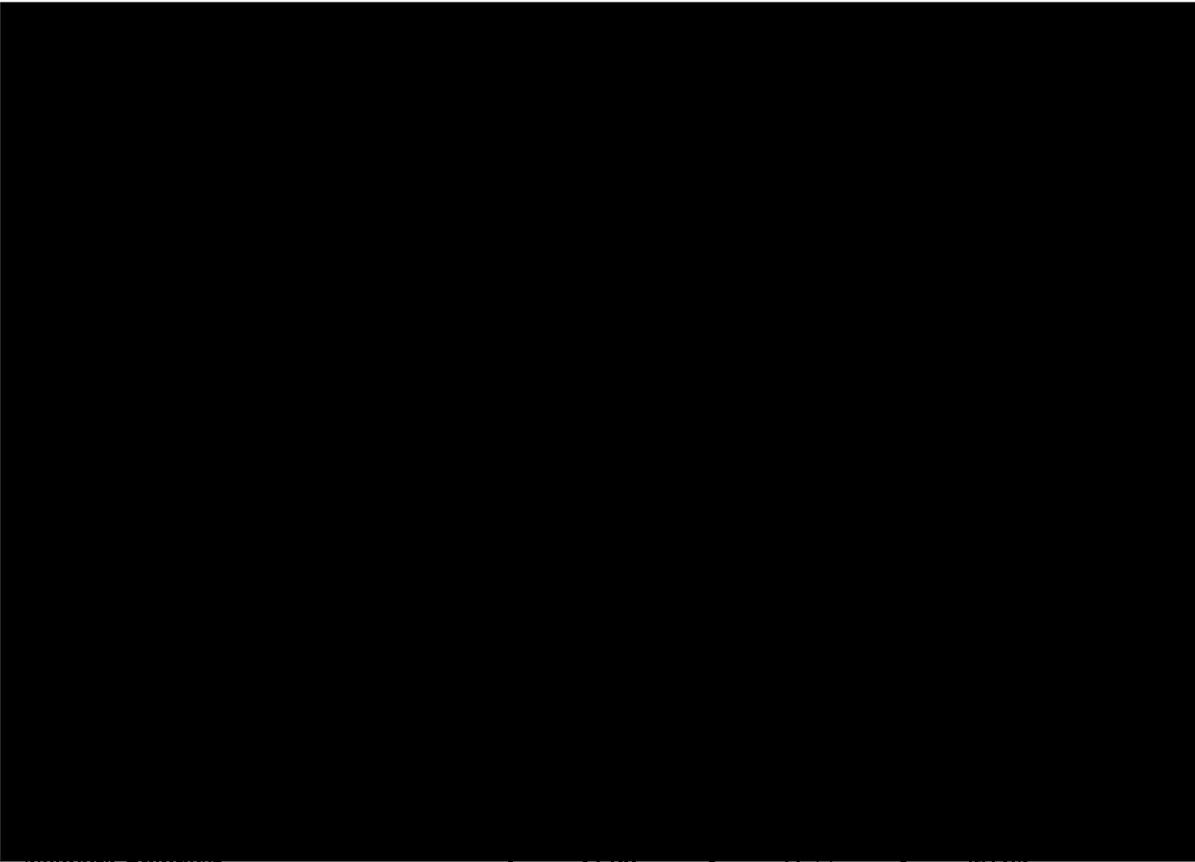
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SECTION B -- SUPPLIES OR SERVICES AND PRICES

B.1 SCHEDULE OF SUPPLIES OR SERVICES/PRICES AND COSTS

Base Period: July 3, 2002 - June 30, 2003

<u>Labor Category</u>	<u>On-Site (Furniture)</u>	<u>On-Site (w/o Furniture)</u>	<u>Off-Site</u>
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EXEMPTION 4 (FOIA)
5 USC Sec. 552(b)(4)

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Other Direct Costs/Year
Including Rent, Utilities and Maintenance

B.2 OPTION PERIOD 1

Option Period 1: July 1, 2003 - June 30, 2004

Labor Category	On-Site (Furniture)	On-Site (w/o Furniture)	Off-Site
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EXEMPTION 4 (FOIA)
5 USC Sec. 552(b)(4)

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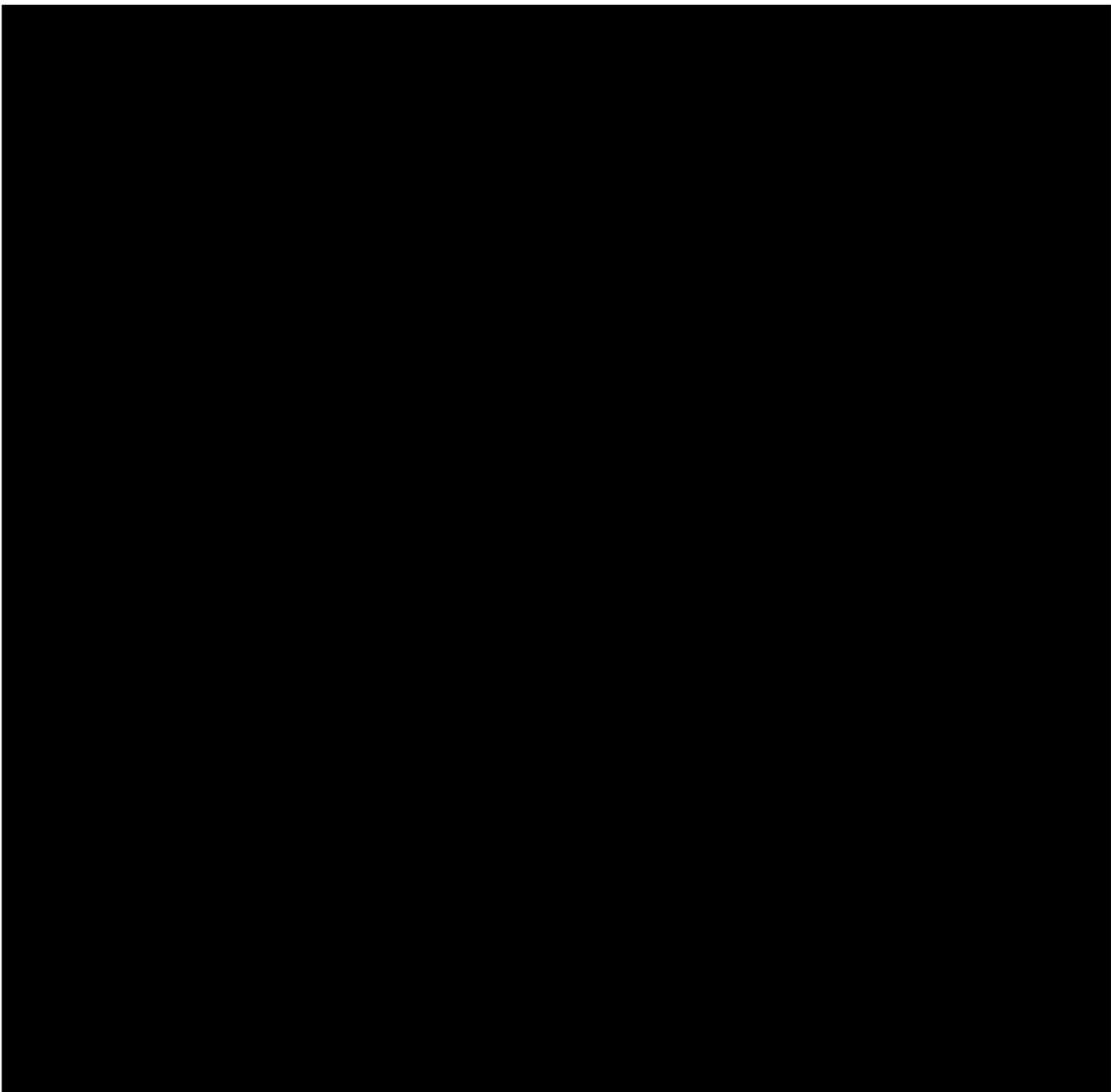


Other Direct Costs/Year
Including Rent, Utilities and Maintenance

B.3 OPTION PERIOD 2

Option Period 2: July 1, 2004 - June 30, 2005

Labor Category	On-Site (Furniture)	On-Site (w/o Furniture)	Off-Site
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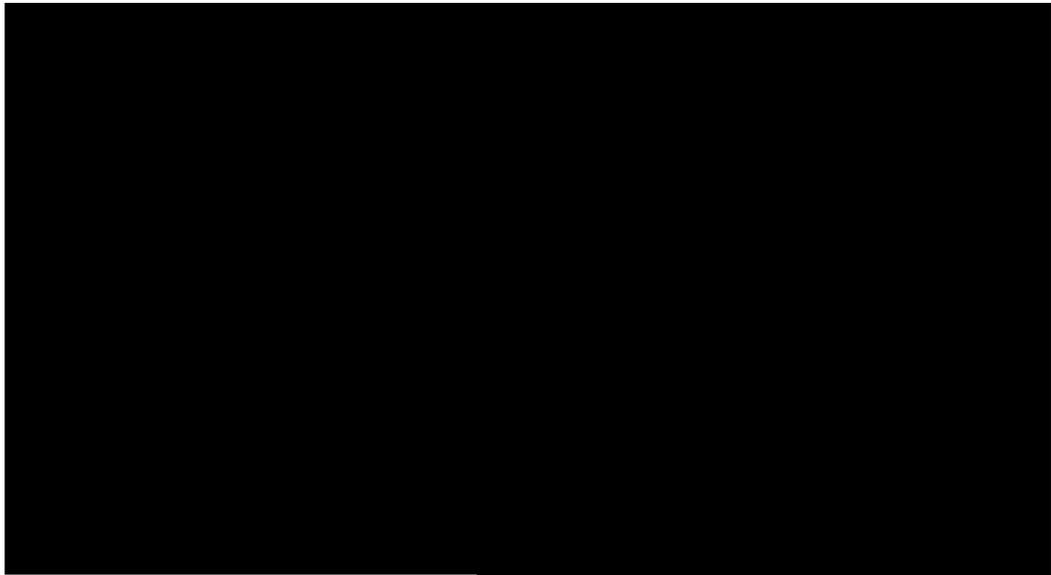
Other Direct Costs/Year
Including Rent, Utilities and Maintenance

B.4 OPTION PERIOD 3

Option Period 3: July 1, 2005 - June 30, 2006

Labor Category	On-Site (Furniture)	On-Site (w/o Furniture)	Off-Site
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EXEMPTION 4 (FOIA)
5 USC Sec. 552(b)(4)



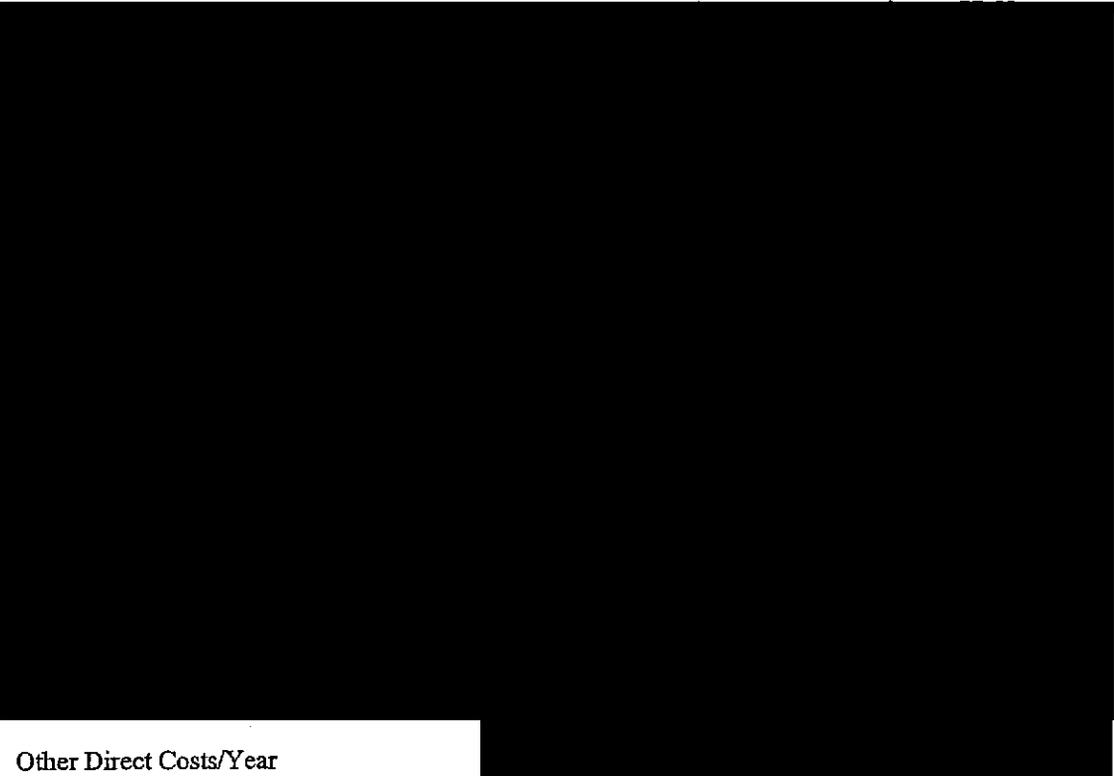
Other Direct Costs/Year
Including Rent, Utilities and Maintenance

B.5 OPTION PERIOD 4

Option Period 4: July 1, 2006 - June 30, 2007

Labor Category	On-Site (Furniture)	On-Site (w/o Furniture)	Off-Site
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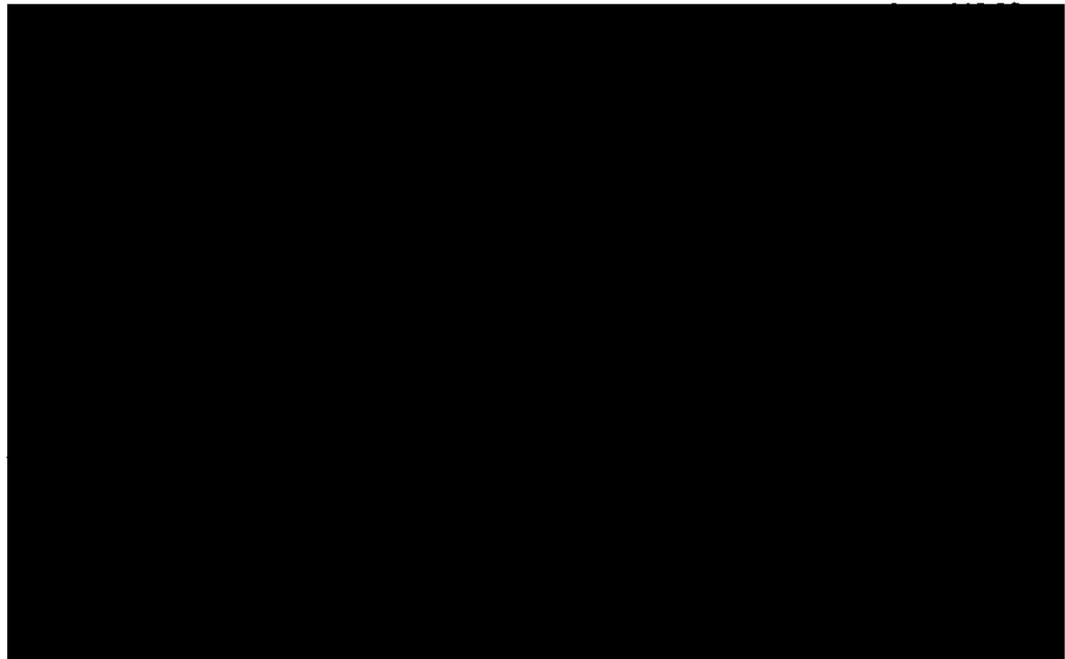


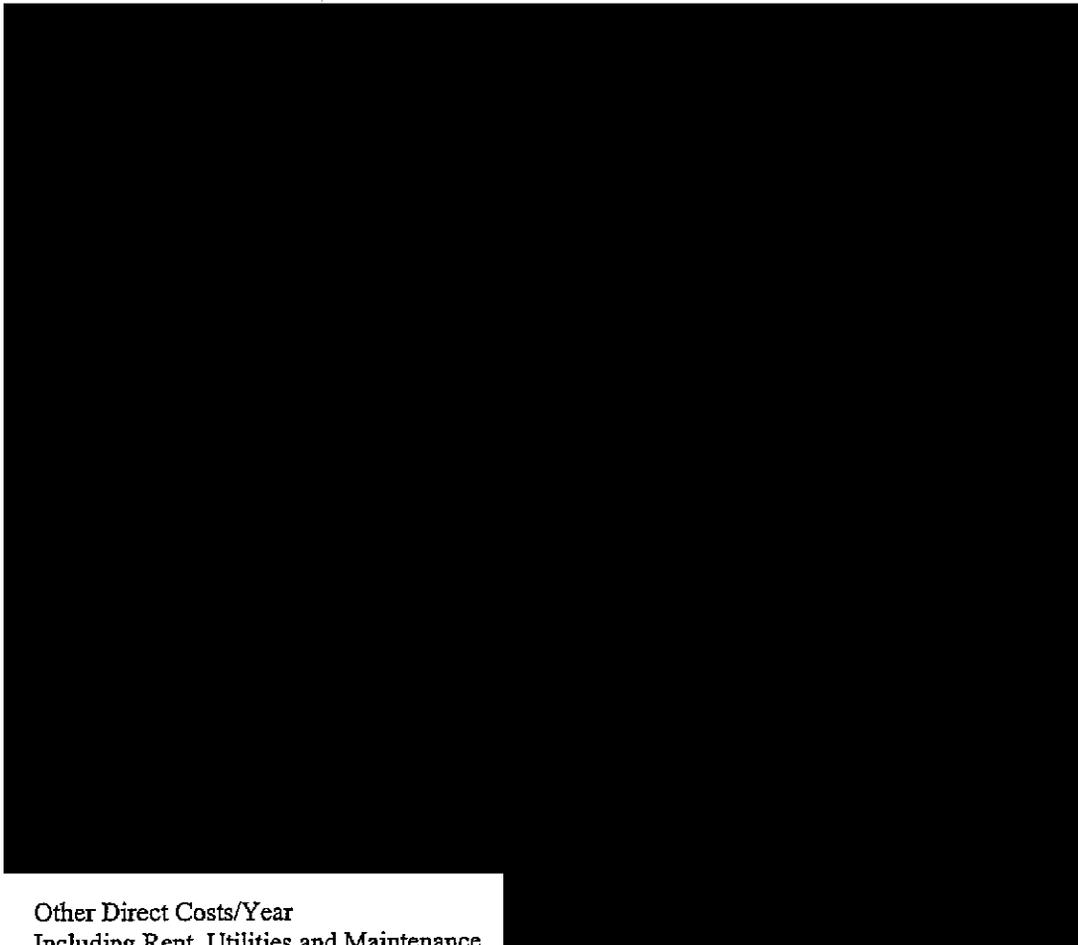
Other Direct Costs/Year
Including Rent, Utilities and Maintenance

B.6 OPTION PERIOD 5

Option Period 5: July 1, 2007 - June 30, 2008

Labor Category	On-Site (Furniture)	On-Site (w/o Furniture)	Off-Site
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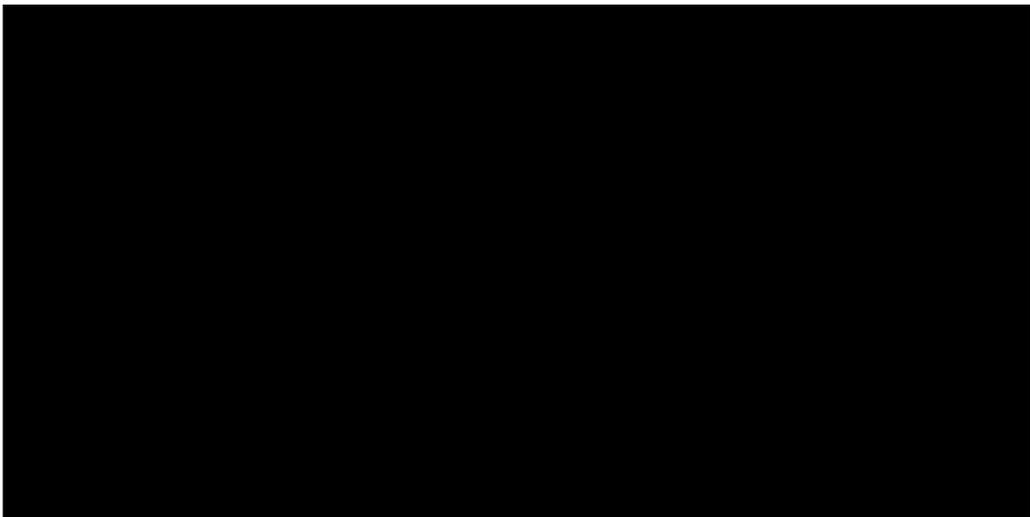


Other Direct Costs/Year
Including Rent, Utilities and Maintenance

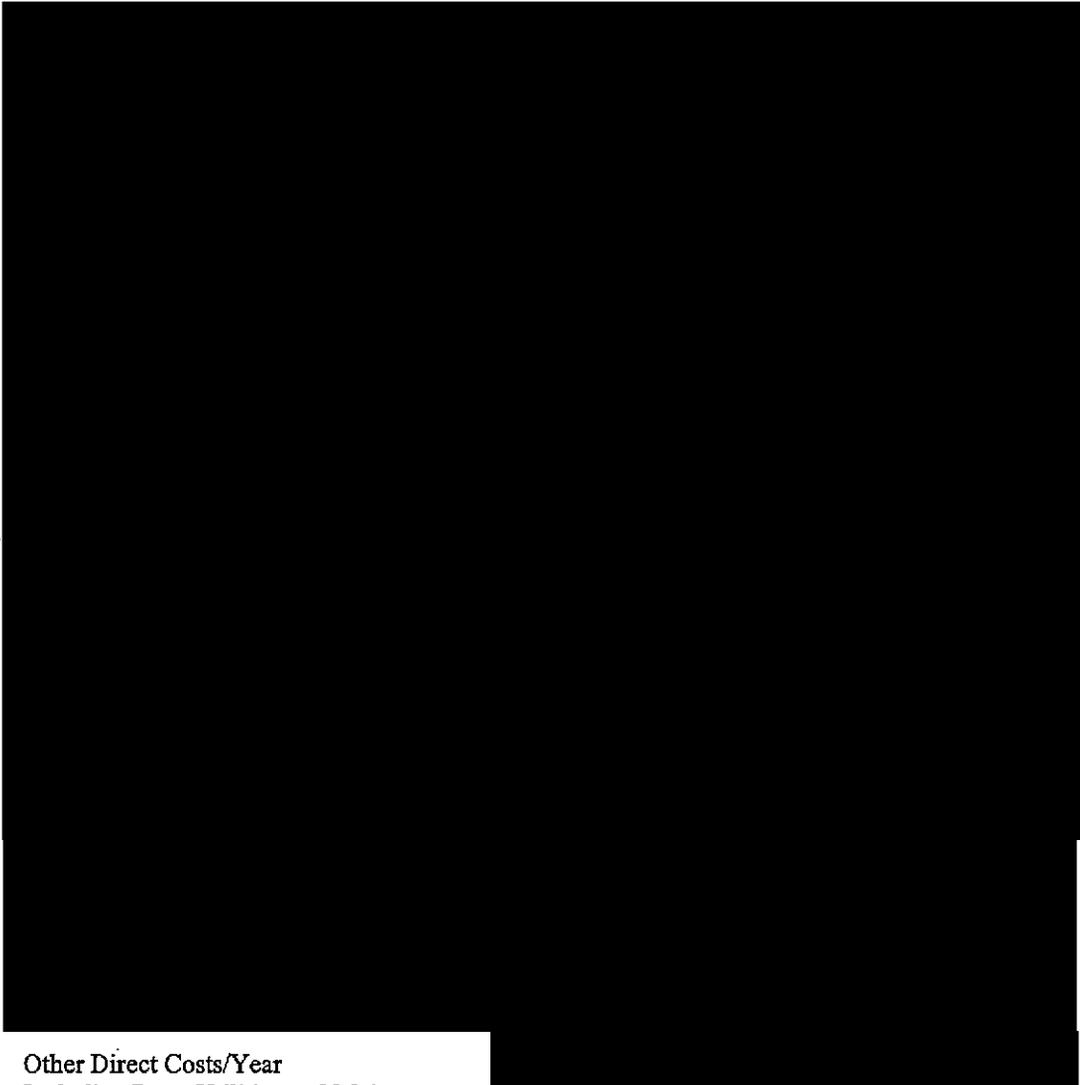
B.7 OPTION PERIOD 6

Option Period 6: July 1, 2008 - June 30, 2009

Labor Category	On-Site (Furniture)	On-Site (w/o Furniture)	Off-Site
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EXEMPTION 4 (FOIA)
5 USC Sec. 552(b)(4)



Other Direct Costs/Year
Including Rent, Utilities and Maintenance

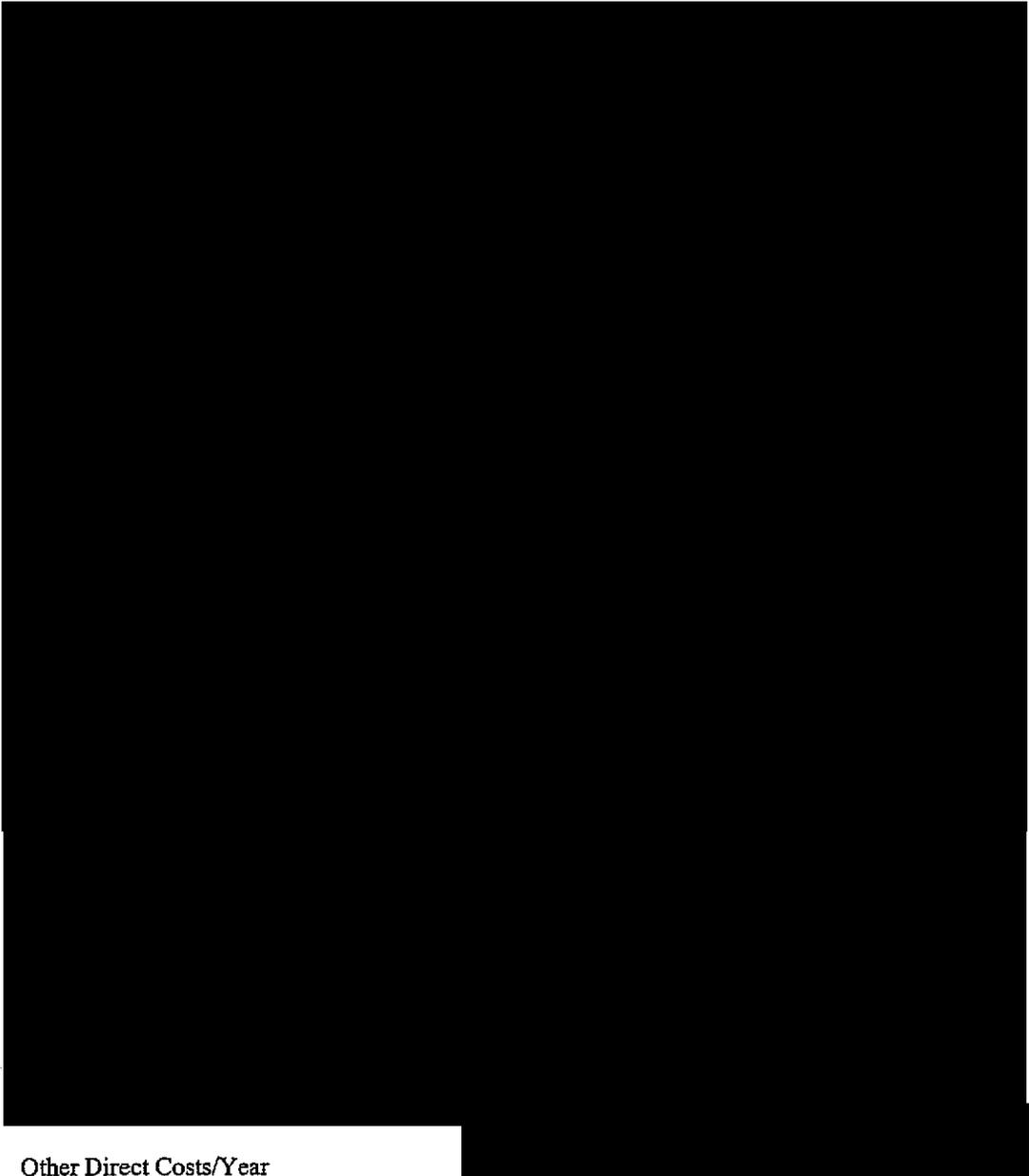
B.8 OPTION PERIOD 7

Option Period 7: July 1, 2009 - June 30, 2010

Labor Category	On-Site (Furniture)	On-Site (w/o Furniture)	Off-Site
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EXEMPTION 4 (FOIA)
5 USC Sec. 552(b)(4)

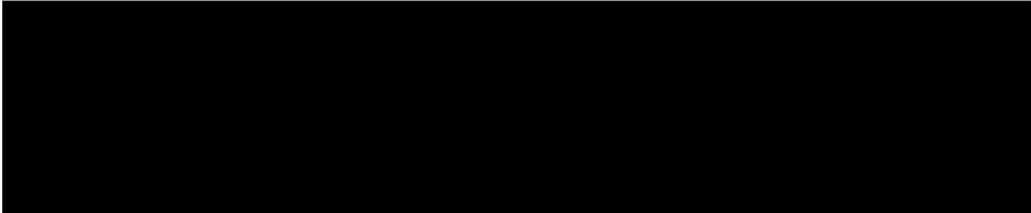


Other Direct Costs/Year
Including Rent, Utilities and Maintenance

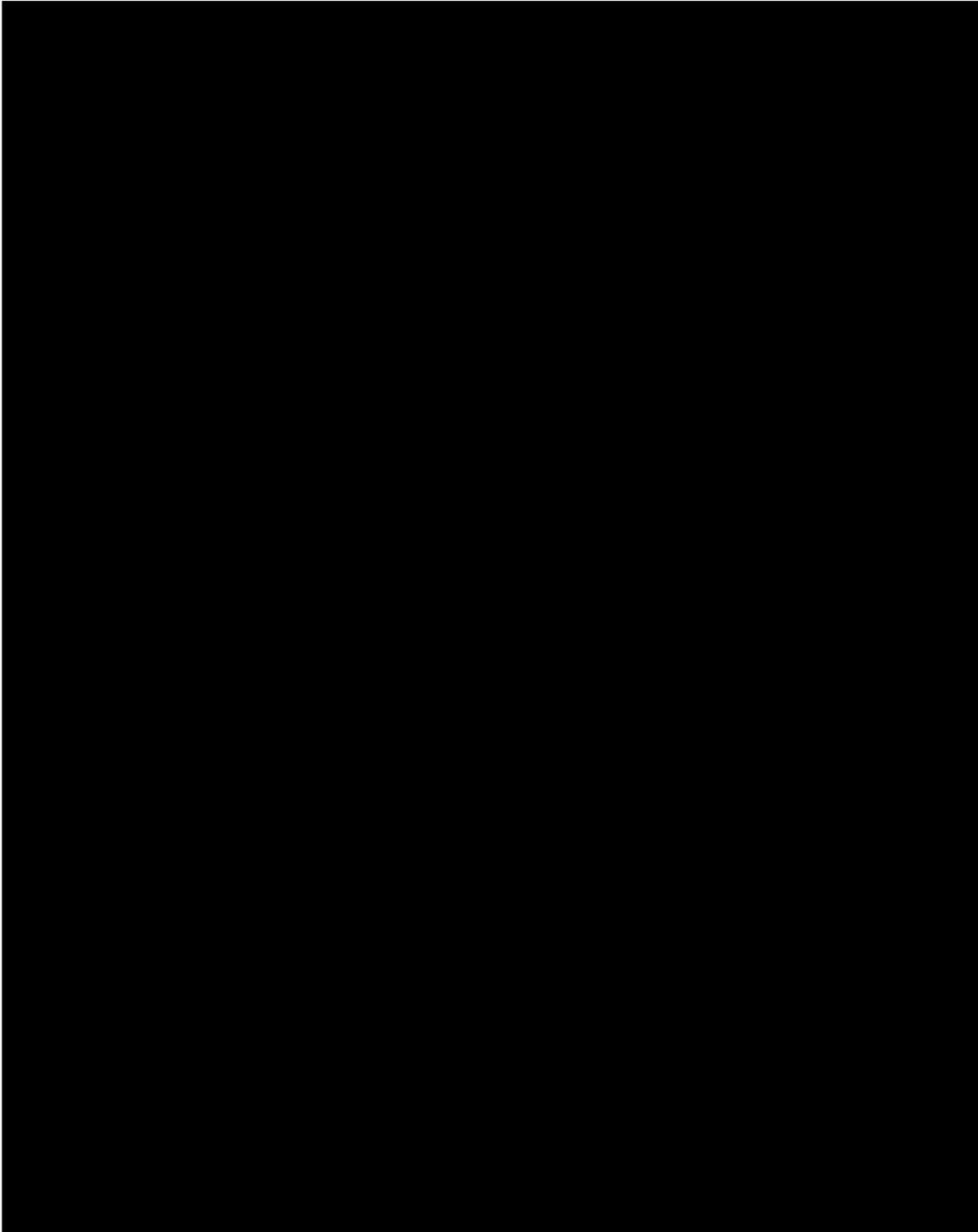
B.9 OPTION PERIOD 8

Option Period 8: July 1, 2010 - June 30, 2011

Labor Category	On-Site (Furniture)	On-Site (w/o Furniture)	Off-Site
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EXEMPTION 4 (FOIA)
5 USC Sec. 552(b)(4)



Other Direct Costs/Year
Including Rent, Utilities and Maintenance

B.10 OPTION PERIOD 9

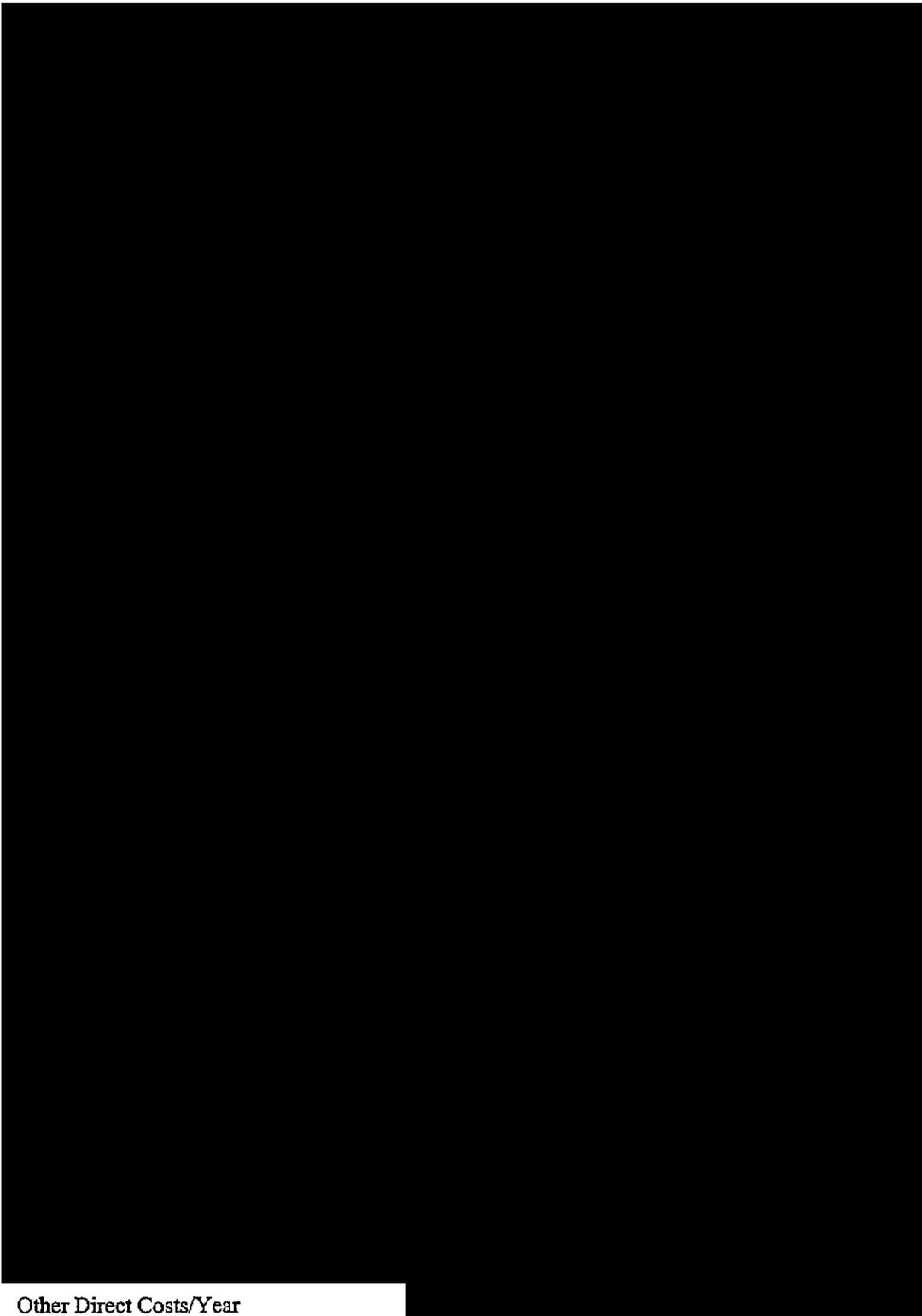
Option Period 9: July 1, 2011 - June 30, 2012

Labor Category	On-Site (Furniture)	On-Site (w/o Furniture)	Off-Site
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**EXEMPTION 4 (FOIA)
5 USC Sec. 552(b)(4)**



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Other Direct Costs/Year
Including Rent, Utilities and Maintenance

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B.1 The ceiling price of this contract is \$ 160,278,603.61. The Contractor shall not make expenditures or incur obligations in the performance of this contract which exceed the ceiling price specified herein, except at the Contractor's own risk. The Government shall not be liable for any costs incurred in excess of \$ 160,278,603.61.

B.2 Notwithstanding the ceiling price for this contract, the Government shall not be liable for any costs incurred in excess of the amount contained in each task order issued under this contract. Each task order shall be independent. The Contractor shall not exceed the amount contained in the applicable task order for performance under the applicable task order.

B.3 The Contractor shall not invoice at rates in excess of the hourly rates specified in the schedule in Section B.

B.4 If at any time during the performance of any task order, the Contractor has reason to believe that the total price to the Government to complete the task order will be greater than the authorized ceiling amount, the Contractor shall notify the Contracting Officer, giving a revised estimate of the total price for performing the task and giving supporting documentation.

B.12 OTHER DIRECT COSTS

All other direct costs associated with this contract shall be authorized by the Contracting Officer (CO). Other direct costs include all direct costs of a task order which are not attributable to the labor categories provided above. Other direct costs shall be reimbursed on a time and materials basis unless otherwise negotiated prior to issuance of any task order. Any travel costs associated with this contract, if applicable, shall be in accordance with the Federal Travel Regulations.

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SECTION C -- DESCRIPTIONS AND SPECIFICATIONS

C.1 DESCRIPTION/SPECIFICATIONS/WORK STATEMENT

Facilities Maintenance and End User Support
Performance Based Service Contracting
Statement of Work

SECTION C - DESCRIPTION/SPECIFICATIONS/WORK STATEMENT

C.1 Purpose

The intent of this contract is to obtain comprehensive Information Technology (IT) services. The services to be provided are: network operations; help desk support; comprehensive management and end-user support of hardware and all microcomputer-related software; asset management; and UNIX and NT operating system support. At its option the United States Patent and Trademark Office (USPTO) may require support for the future relocation of its Information Technology (IT) assets to its new facility in Alexandria, VA.

C.2. Definitions

Deployment - Generally a deployment is defined, for the purposes of this requirement, as the issuance, installation or replacement of any desktop, peripheral or component moved, delivered or installed into service by the Contractor. These components shall be fully functional and configured in accordance with the current standards of the agency (this includes loading and testing all mandatory and optional software). If replacing a desktop, peripheral or component, replacement must be equivalent or of better performance. If the customer has data files, documents, or other files on defective desktop hardware, the Contractor shall ensure that such files (when not damaged) are transferred to the replacement computer.

Franconia Warehouse - The location of the Franconia Warehouse is 6808 Loisdale Road, Springfield, VA. The telephone numbers are (703) 924-6058 and (703) 924-9382. The point of contacts are Duane Davis and Nick Massillon.

Fullerton Center - (Newington Warehouse) - The location of the Fullerton Center is 7401 Fullerton Road, Springfield, VA. The telephone number is (703) 644-1700. The point of contact is Jerry Hill.

Patent Data Capture Contractor - The location of the Patent Data Capture (PDC) Contractor is 3443 Carlyn Springs Road, Falls Church, VA 22041. The telephone number is (703) 750-9580. The point of contact is Bill Docca.

Patent and Trademark Depository Library Depot Support - The Contractor shall pack and ship replacement hardware to the Patent and Trademark Depository Library (PTDL) so that it will arrive within five (5) working days of the receipt of the problem ticket. The Contractor shall include any necessary information regarding replacement hardware and instructions for the PTDL to pack and ship back the broken hardware. The Contractor shall be responsible for packing, shipping (including charges) and tracking the equipment.

C.3 Background

The USPTO, an organization with an employee base of approximately 7,000, has a requirement for facilities management and end user support. The mission of the USPTO is to administer the laws and regulations related to patents and trademarks in order to promote industrial and technical progress in the United States and strengthen the national economy. The USPTO carries out its mission by examining patent and trademark applications, issuing patents and registering trademarks, disseminating patent and trademark information to the public, and by encouraging a domestic and international climate in which intellectual property can flourish.

The USPTO is operating under a congressional mandate to implement state-of-the-art computer data and information retrieval systems in support of virtually all aspects of its operations. In support of its mission the USPTO is responsible for the accessibility, accuracy, and integrity of more than 40 million patent, patent related documents, and trademarks. Each year approximately 300,000 patent applications and 375,000 trademark applications are processed. These application filings are expected to increase by approximately ten percent (10%) per year.

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The USPTO is supported by an information technology (IT) infrastructure foundation of hardware, system software, and network communications that have been deployed in support of the mission of the USPTO. The IT infrastructure provides access to application systems and office automation tools used in the performance of the work processes. The USPTO's highest level of management has placed an extremely high priority on providing consistent, available, and reliable network and data processing services. Also inherent in this process is providing for the expansion of services and capabilities.

The automated systems currently in use are complex in scope and far-reaching in application, both within and outside the USPTO. Successful operation is largely dependent upon the collective efforts of a staff of diverse technical specialists able to quickly respond to the many variables and conditions that accompany efforts of this proportion. It is neither practical nor cost-effective, however, to fully staff all of these specialties in-house on a permanent basis because the need may be intermittent. For additional information regarding USPTO automated systems and IT Infrastructure please see <http://www.uspto.gov/web/offices/ac/comp/proc/acquisitions/oamref.htm>.

C.4 Description, Current Environment, and Requirements

The Contractor shall provide solutions that meet or exceed the current environment, requirements and performance standards described in the sections below. This SOW is organized in the following manner: the Universal Contractual Requirements (§C.4.1) are general requirements which apply to all IT support services required under this contract (Advanced Problem Resolution; Data Maintenance support; DeskTop Field Support; Help Desk support; Network Operations; UNIX and NT Operating system support; Database Administration; User ID and Password Administration; Technical Writing; Warehouse support; Hardware Maintenance and Inventory support). The Universal Contractual Requirements also contain performance measures which the USPTO expects the contractor to meet or exceed unless specified otherwise under the individual IT support areas. In addition to the Universal Contractual Requirements, the SOW describes in detail discrete IT support areas covered by this contract. All IT support areas are introduced by a general Description, followed by a Current Environment, which is a detailed description of the environment and performance measures which presently exist here at USPTO, and lastly, there is a Requirements section, which provides specific requirements applicable to the IT support services area. In addition to the Universal Contractual Requirements, the Contractor shall provide solutions that meet or exceed the Current Environments of the discrete IT support areas, the specific Requirements and performance measures described therein.

C.4.1 Universal Contractual Requirements - Description:

C.4.1.1 This section describes requirements, which apply to all areas of IT support services, which follow.

C.4.2 Universal Contractual Requirements - Current Environment:

C.4.2.1 The Contractor ensures that all users are notified, as appropriate, of the release of system changes at least five (5) and also one (1) business day prior to installation.

C.4.2.2 Currently the Contractor responds to ninety-five percent (95%) of problems within two (2) hours of receipt of problem ticket. A response is defined as speaking to the customer, leaving a voice mail message for the customer, sending an email message to the customer or leaving a work service form at the customer's site. Currently, the Contractor resolves or circumvents ninety-five percent (95%) of problems within four (4) hours of receipt of problem ticket. These commitments apply to all problems assigned to the Contractor, unless otherwise stipulated in a Service Commitment, Task Order (TO), or Service Level Agreement (SLA).

C.4.2.3 If the Contractor performs a site visit and the customer is available prior to leaving the site, the contractor confirms with the customer its satisfaction with the work performed. This confirmation is captured by the act of the customer signing and dating the work service form. Regardless if the customer is available during a site visit or not, the contractor always leaves a work service form with the customer. This work service form is accurate, legible and includes at a minimum the following information:

- a. An explanation of work performed during the site visit;
- b. A place where the customer can confirm the visit was satisfactory, a problem/change record number if applicable;
- c. The contractor individual(s) name who made the site visit; and;
- d. The contractor's phone number and a POC in the event there are any questions the customer needs answered after the contractor leaves the site.

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One copy of the form is left with the customer, and one is kept in the Contractor's records. The Contractor does not close or resolve any records without obtaining confirmation from the customer that the service has been performed or the problem has been resolved. However, an exception is made if three (3) attempts to contact a customer over a three (3) day period do not produce a response from the customer.

C.4.2.4 Currently the contractor logs approximately 112,000 Enterprise-Wide Asset Management System (EAMS) records per year.

C.4.2.5 The Contractor maintains a minimum 95% customer satisfaction rating at all times. This translates to Contractor receiving no more than 5% "re-opened" and "unsatisfactory" ratings. Ratings will be measured through the Customer Quality Check process. The rating levels given during the quality checks are: outstanding, very good, satisfactory, unsatisfactory and re-open.

C.4.3 Universal Contractual Requirements - Requirements:

C.4.3.1 The Contractor shall provide resources with expertise in the latest technologies employed by the USPTO, shall furnish all necessary personnel, material, equipment, services and facilities (except as otherwise provided) necessary to perform all of the requirements in the statement of work.

C.4.3.2 The Contractor shall provide technical assistance in developing, maintaining, and storing of all Task Manager Directives, Service Commitments, Service Level Agreements (SLA), Operational Support Plans (OSP), Standard Operating Procedures (SOP) and Technical Notes established by the USPTO.

C.4.3.3 The Contractor shall abide by all Task Manager Directives, Service Commitments, Service Level Agreements (SLA), Operational Support Plans (OSP), Standard Operating Procedures (SOP) and Technical Notes established by the USPTO.

C.4.3.4 The Contractor shall not make any changes, modifications, alterations, or enhancements to the USPTO's infrastructure, hardware, or software without detailed change records being approved by the USPTO.

C.4.3.5 The Contractor shall create a service request record in a USPTO provided tracking system for all calls received from customers or problems identified by the Contractor. The Contractor shall assign the call, as appropriate, for resolution and/or action. The Contractor shall thoroughly document all work they perform in the appropriate problem/change record after each new status or within two (2) hours of performing the work, whichever comes first.

C.4.3.6 Unless otherwise noted in a specific requirement, the Contractor shall provide support to the USPTO from 6:00 a.m. to 6:00 p.m., Monday through Friday. Unless specifically specified, all times are Eastern Time and the USPTO requires service on all Federal holidays except those observed by the USPTO. The only holidays that the USPTO observes and the agency is closed for are Thanksgiving, Christmas, and New Year's Day.

C.4.3.7 The Contractor shall use the mobile (Psion) units, provided by the USPTO, to record all changes for asset management purposes and to document all field service work performed.

C.4.3.8 Any equipment, peripheral or component moved, delivered, or installed into service by the Contractor shall be fully functional and at a performance level equivalent to equipment removed for repair. Replacement equipment shall have supported software loaded, configured, and all peripherals attached. If the customer has data files, documents, or other files on the defective desktop hardware, the Contractor shall ensure that such files (when not damaged) are transferred to the replacement computer.

C.4.3.9 The Contractor shall, on a daily basis, participate in technical evaluations of proposed new hardware, software, and networking technologies at the USPTO. The Contractor shall work with the USPTO to certify the serviceability and maintainability of network technologies introduced.

C.4.3.10 The Contractor shall perform a Root Cause Analysis (RCA), for problems that it resolves, when requested.

C.4.3.11 The Contractor shall be responsible for the receipt and tracking of all hardware shipped to the Contractor's facility on behalf of the USPTO, utilizing the USPTO inventory tracking system.

C.4.3.12 The Contractor shall be responsible for requests to lockdown USPTO hardware. Any equipment, peripheral or component moved, delivered or installed into service by the Contractor shall be locked down as required.

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C.4.3.13 The Contractor shall review daily asset management activities (deployments, excess, moves, etc.) reports to ensure the proper use of the inventory system. Any discrepancies found must be corrected with three (3) business days.

C.4.3.14 The Contractor shall provide support to the warehouses in both Franconia and Newington (please see definitions for further information). This on-location support shall include all of the Personal Computers and peripherals (connected to PTOnet and to the Federal Records Center via modems) and PALM/TRAM equipment (connected to the A16 via modems). Support shall be for the hardware, software and PTOnet.

C.4.3.15 The Contractor shall provide support including PTOnet support, Monday through Friday, from 7:00 a.m. to 4:00 p.m., for the PDC Contractor location in Falls Church, VA (please see definitions for further information). The Contractor shall provide remote support to the PDC Contractor locations in Pennsylvania, which includes all of the Personal Computers and peripherals, and PALM equipment. Contractor shall provide support Monday through Friday, from 7:30 a.m. to 11:30 p.m., Saturday and Sunday from 7:30 a.m. to 5 p.m. Contractor shall notify Search and Information Resources (SIRA) of any problems.

C.4.3.16 The USPTO requires that all Electronic Information Technology (EIT), as that term is defined at FAR §2.101, delivered under the contract comply with the applicable EIT technology accessibility standards issued by the Architectural and Transportation Barriers Compliance Board set forth at 36 CFR part 1194. The applicable standards are available at <http://www.access-board.gov/news/508-final.htm>.

C.4.4 Advance Problem Resolution Support - Description (current staffing level - 17):

C.4.4.1. Serves as an advanced level of support for resolving desktop problems. This support includes analysis and trouble-shooting problems to determine possible trends, recommendation of corrective action, and documentation of trouble-shooting procedures for the Help Desk to follow for recurring problems.

C.4.5 Advanced Problem Resolution Support - Current Environment:

C.4.5.1 The current Contractor staff is composed of Microsoft Certified Systems Engineers. These staff members also possess a background in systems programming, network engineering, or security administration.

C.4.5.2 The Contractor follows-up on any problems where OCIO has failed to meet its service level commitments by one (1) day or more. This follow-up includes, but is not necessarily limited to, the following:

- a. Contacting the problem assignee to confirm that the assignee is aware of the problem.
- b. Contacting other groups or individuals, as called for in the OSP, to work on aspects of the problem.
- c. Providing trouble-shooting assistance, including at the customer site, when directed to do so by the Task

Managers.

- d. Notifying the Task Managers when a service level commitment has been missed.
- e. Assisting in problem recovery when directed to do so by the Task Managers.
- f. Updating the Task Managers, as new information becomes available, on the status of the problems.
- g. Ensuring that the Help Desk or the problem assignee is notifying the customer of any progress in resolving the

problem.

h. Ensuring that within one (1) hour of the problem being resolved, either the Help Desk or the problem assignee has notified the customer.

- i. Notifying the Task Managers, within two (2) hours of receipt, of any problems that will require a RCA.
- j. Notifying the Task Managers, within one (1) day of problem resolution or circumvention, of problems that may be

application system deficiencies.

k. Updating and documenting trouble-shooting procedures that the Help Desk should follow if similar problems occur in the future.

C.4.5.3 The Contractor reviews all draft OSP for accuracy and completeness. The Contractor provides its written comments within five (5) working days of receiving a plan.

C.4.5.4 The Contractor is currently responsible for verifying the continued accuracy and completeness of all existing Operational Support Plans at least once every nine (9) months.

C.4.5.5 The Contractor analyzes new problem records daily for possible trends. The types of trends that are often identified may include unanticipated problems caused by the implementation of a change and problems that are reported by individual customers

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but actually impact multiple customers (examples: line outage, router failure). Once identified, the Contractor provides the Task Managers with written notice of these trends within one (1) hour.

C.4.5.6 The current Contractor's support services include those services listed below. Normally all are completed within five (5) hours of receiving a request:

- a. Verification of current baseline/cost center[s] prior to testing;
- b. Reloading of the appropriate baseline/cost center[s] prior to testing;
- c. Coordination of SMS push packages to the appropriate workstations;
- d. Verification and/or reissuing of test user account[s] and password[s];
- e. Verification of proper network configuration, connections and profiles for the applicable cost-center network servers[s]; and/or
- f. Coordination with help desk [and others, as required] of Information Technology Testing Division (ITTD) hardware and/or software problem resolution [s].

C.4.5.7 Currently the USPTO has approximately one hundred and twenty (120) employees that participate in the Work-at-Home program. This number is likely to increase during the life of the contract.

C.4.5.8 The Contractor responds to ninety-five percent (95%) of service requests within one (1) business day of receipt of service ticket.

C.4.5.9 The Contractor completes ninety-five percent (95%) of service requests for fewer than ten (10) desktop upgrades or installs within five (5) business days of receipt of service ticket with the exception of local software installs which is completed within two (2) business days. The Contractor negotiates with the COTR of service requests for more than ten (10) desktop upgrades or installs within three (3) business days of receipt of service ticket and complete service request within the timeslot agreed upon.

C.4.6 Advanced Problem Resolution Support - Requirements:

C.4.6.1 The Contractor shall provide technical assistance and expertise in the Knowledge Pak software; guide the development of standards and naming conventions for the USPTO Knowledge Paks and document the same.

C.4.6.2 The Contractor shall provide technical support to Work at Home participants.

C.4.6.3 The Contractor shall provide technical support for all USPTO operated systems.

C.4.7 Data Maintenance Support - Description (current staffing level - 11):

C.4.7.1 Provides support to the USPTO patent and trademark databases through timely and accurate loading and updating of a diverse number of databases.

C.4.8 Data Maintenance Support - Current Environment:

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C.4.8.1 Currently the Contractor loads the following:

- a. Weekly Issue Patent Image Data - five (5) days a week, eight (8) hours per day.
- b. Trademark application and registration cropped images - five (5) days a week, one (1) hour per day.
- c. Weekly Issue Patent Image Data from Tagged Image File Format (TIFF) - weekly.
- d. Weekly Issue Application Image Data - five (5) days a week, eight (8) hours per day.
- e. Weekly Issue Application Image Data from TIFF - weekly.
- f. Foreign Patent Image Data for both the European and Japan Patent Offices (EPO/JPO) - seven (7) days a week, twenty-four (24) hours per day.
- g. Non-patent literature data - five (5) days a week, eight (8) hours per day.
- h. Patent data (USPAT, USOCR, EPO, JPO and Derwent data) - five (5) days a week, eight (8) hours per day.
- i. Global Patent Information data "front page data" - five (5) days a week, one (1) hour per day.

C.4.8.2 Currently the Contractor monitors, troubleshoots, and provides the following:

- a. Trademark daily Bibliographic Research Service (BRS) - Update process - five (5) days a week, three (3) hours per day.
- b. Data File Delivery (DFD) Update process - weekly.

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- c. Software problems, investigates errors that may be causing software problems, corrects all support software problems that occur in the load processes and verifies the operability of all load systems after corrections have been completed.
- d. Patent(s) and application(s) that fail to process successfully through the text BRS data load process and provide recovery of the text load due to failures.
- e. Patent(s) and application(s) that fail to process successfully through the Patent Image Retrieval System (PIRS) image load process and provides recovery of image load due to failures.
- f. Weekly Issue Text and Image Load.
- g. Ad hoc requests for analysis, special load processing, production assistance, and file load support in exigent situations.
- h. Performing, maintaining and tracking the back-ups of all text and image data that is successfully loaded.
- i. Programming support to load/reload patent(s) and application(s).

C.4.8.3 Corrections are made in the shortest time possible in order to resume any load that is in a "Wait State" due to software problems. This support is provided seven (7) days a week, twenty-four (24) hours per day.

C.4.9 Data Maintenance Support - Requirements:

C.4.9.1 The Contractor shall load the following:

- a. Weekly Issue Patent Image Data - five (5) days a week, eight (8) hours per day.
- b. Trademark application and registration cropped images - five (5) days a week, one (1) hour per day.
- c. Weekly Issue Patent Image Data from TIFF - weekly.
- d. Weekly Issue Application Image Data - five (5) days a week, eight (8) hours per day.
- e. Weekly Issue Application Image Data from TIFF - weekly.
- f. Foreign Patent Image Data for both the EPO and JPO - seven (7) days a week, twenty-four (24) hours per day.
- g. Non-patent literature data - five (5) days a week, eight (8) hours per day.
- h. Patent data (USPAT, USOCR, EPO, JPO and Derwent data) - five (5) days a week, eight (8) hours per day.
- i. Global Patent Information data "front page data" - five (5) days a week, one (1) hour per day.

C.4.9.2 The Contractor shall monitor, troubleshoot, and provide the following:

- a. Trademark daily BRS-Update process - five (5) days a week, three (3) hours per day.
- b. DFD Update process - weekly.
- c. Software problems, investigates errors that may be causing software problems, corrects all support software problems that occur in the load processes and verifies the operability of all load systems after corrections have been completed.
- d. Patent(s) and application(s) that fail to process successfully through the text BRS data load process and provide recovery of the text load due to failures.
- e. Patent(s) and application(s) that fail to process successfully through the PIRS image load process and provides recovery of image load due to failures.
- f. Weekly Issue Text and Image Load.
- g. Ad hoc requests for analysis, special load processing, production assistance, and file load support in exigent situations.
- h. Performing, maintaining and tracking the back-ups of all text and image data that is successfully loaded.
- i. Programming support to load/reload patent(s) and application(s).

C.4.9.3 The Contractor shall ensure corrections are made in the shortest time possible in order to resume any load that is in a "Wait State" due to software problems. This support is provided seven (7) days a week, twenty-four (24) hours per day.

C.4.10 Desktop Field Support - Description (current staffing level - 70):

C.4.10.1 Supports the USPTO desktop lifecycle from installation and configuration, move and deployment, maintenance, repair, upgrade, and surplus. The term desktop includes but is not limited to:

- a. USPTO approved desktop CPU's, approved and non-approved laptop CPU's/docking stations, barcode readers (BCR) and accompanying peripherals which include desktop and network printers, scanners, keyboards, monitors, scan guns, etc.
- b. USPTO approved desktop workstation operating systems; USPTO approved desktop COTS software and desktop AIS.
- c. PROMARK group printers with Windows NT Server 4.0 printer servers, Walk-up NT 4.0 workstations that utilize an additional local account and NT policies.

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Also included are the desktop move and surplus support requirements of miscellaneous USPTO hardware, for example, scanners, modems, LAN probes, routers, hubs, stand-alone servers, DVD towers, jukeboxes, fax machines and convenience copiers (copiers not connected to a desktop).

C.4.11 Desktop Field Support - Current Environment:

C.4.11.1 Whenever working on equipment, the Contractor uses a grounding strap to protect the equipment from Electrostatic Discharge (ESD) damage. The grounding strap should conform to the American National Standards Institute (ANSI) standards in regard to EOS/ESD Grounding.

C.4.11.2 The Contractor currently provides its "best effort" support to non-USPTO approved laptop CPU's/docking stations. For hardware related problems, the laptop/docking station may be sent out to a third-party vendor for repair; if laptop operating system and/or drivers requested by customer are not available or not compatible, then the Contractor shall provide an alternative recommendation to customer.

C.4.11.3 During installations the Contractor removes the old PC from the customer location and retains customer's old PC for five (5) business days.

C.4.11.4 Currently the Contractor is able to perform thirty-five (35) PC installations per day, Monday through Friday.

C.4.11.5 The Contractor currently commits a four (4) hour timeslot with customer to complete an installation.

C.4.11.6 The current Contractor performs twenty-two (22) data back up and user configurations of PCs and baselines the twenty-two (22) PCs by COB the day prior to installation day (all cost centers will have Ghost images so that only optional applications will be installed via the USPTO SW Distribution Servers (e.g. WinInstall).

C.4.11.7 Currently the Contractor dedicates two technical/customer service follow up staff members that visit each user who had a PC replacement the previous day. Their responsibility is to check on how the replacement process went, answer any questions, provide information and fix any lingering problems.

C.4.11.8 Currently the Contractor resolves and circumvents group printer paper, paper jam and toner problems within one (1) hour of being notified of a problem. Notification is generally issued as a problem ticket or by an automated printer monitoring system.

C.4.11.9 Currently the Contractor maintains desktop hardware spare equipment including the most current desktop and laptop CPU's at inventory levels that ensure problems may be circumvented/resolved within four (4) hours.

C.4.11.10 Currently the Contractor performs a total of six (6) daily checks of individual group printers. These six (6) checks must be at least two (2) hours apart. The morning check shall take place at or before 7:30 a.m. and the afternoon check shall take place no later than 7:00 p.m. On weekends and holidays, the Contractor checks each printer two (2) times between the hours of 8 a.m. and 2 p.m. A check consists of:

- Printing a test print from the Walk Up Workstation.
- Clearing jams that occur.
- Completely filling paper tray if necessary.
- Adding toner as necessary.
- Removing trash and clutter as appropriate.
- Completely, accurately and legibly filling out Group Printer log sheet.

C.4.11.11 Currently the support for hardware storage areas consists of the following:

- a. Tracking all hardware as it enters and leaves the storage area.
- b. Testing all hardware as it arrives in the storage area and labeling the hardware with a brief description of any problems identified during testing.
- c. Performing the quarterly asset certification.
- d. Labeling, boxing, and shelving, speakers, cables, keyboards, and small peripherals.
- e. Serving as the point-of-contact for any storage room hardware that needs to be deployed or surplus.
- f. Removing reusable parts from surplus PCs.
- g. Arranging for the surplus of the PCs.

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C.4.11.12 The Contractor completes requests to move/surplus ten (10) or fewer desktop hardware units within one (1) day of receipt of request. Exceptions may be made if customer requests a later, specific move/surplus date.

C.4.11.13 The Contractor completes requests to move/surplus more than ten (10) desktop hardware units within five (5) days of receipt of the request.

C.4.11.14 The Contractor schedules a four (4) hour timeslot with the customer of a move/surplus. This is to inform the customer as to the window of time when they should expect the Contractor to begin and complete the move/surplus.

C.4.12 Desktop Field Support - Requirements:

C.4.12.1 The Contractor shall provide support from 5:30 a.m. to 12:00 a.m. (midnight), Monday through Friday, and from 5:30 a.m. to 10:00 p.m., Saturday, Sunday and holidays.

C.4.12.2 The Contractor shall be responsible for monitoring, troubleshooting, and resolving all operational, hardware, and software problems associated with Promark Group Printers, NT Group Printer Servers and walk-up workstations. The Contractor shall assist with new installation of Group Printers. The Contractor shall add paper, add toner, and clear paper jams for group printers as appropriate. The Contractor shall obtain paper and toner from central repositories currently provided by the USPTO.

C.4.12.3 The Contractor shall be responsible for NT Group Printer System Administration functions.

C.4.12.4 The Contractor shall provide depot support for PTDL workstations requiring replacement within six (6) hours.

C.4.12.5 The Contractor shall support all hardware storage areas Monday through Friday, from 8:00 a.m. to 5:00 p.m.

C.4.13 Help Desk: Electronic Business Support (EBS) - Description (current staffing level - 9):

C.4.13.1 Serves as the primary point of contact for public customers reporting problems or asking questions related to the application systems available on the USPTO web site (www.uspto.gov). The EBS Help Desk ensures that all calls are handled promptly, courteously, and are resolved or sent to the proper service provider within the established timeframe.

C.4.14 Help Desk - Electronic Business Support (EBS) - Current Environment:

C.4.14.1 Currently the Contractor's Technical Service Specialists answers electronic business services incoming calls placed to (800) 786-9199 or (703) 308-4357 up to approximately seventy-five (75) calls and emails per day. They maintain an average speed of answering a call of one (1) minute or less and returning emails within one (1) day of receipt.

C.4.14.2 The Contractor thoroughly documents all work they perform in the appropriate problem/service/change record. The Contractor updates the record within fifteen (15) minutes of performing the work.

C.4.15 Help Desk - Electronic Business Support (EBS) - Requirements:

C.4.15.1 The Contractor shall provide support from 6:00 p.m. to 6:00 a.m., Monday through Friday. The Contractor shall provide twenty-four (24) hour coverage on weekends and holidays.

C.4.16 OCIO Information Technology Help Desk - Description (current staffing level - 35):

C.4.16.1 Serves as the single point of contact for reporting problems with or requesting services to supported hardware and software.

C.4.17 OCIO Information Technology Help Desk - Current Environment:

C.4.17.1 The Contractor returns voice mail messages within thirty (30) minutes and e-mail messages within two (2) hours. The Contractor completes updating of records within fifteen (15) minutes of handling customer calls, voice mails, and emails.

C.4.17.2 The Contractor maintains a daily average answer speed of one (1) minute or less when the weekday call volume is five hundred (500) calls or less. The following average weekday answer speeds will apply to call volumes above five hundred (500):

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Number of Calls	Expected Daily Answer Speed (Minutes)
501-550	1.5
551-600	2
601-650	3
651-700	4
701-800	6
801-900	9
901-1000	12
1000+	no set expectations

C.4.18 OCIO Information Technology Help Desk- Requirements:

C.4.18.1 The Contractor shall answer all incoming calls placed to or transferred to the main help desk number (Currently 703-305-9000).

C.4.18.2 The Contractor shall provide personnel to support the helpdesk from 5:30 a.m. to 12:00 a.m. (midnight), Monday through Friday and from 5:30 a.m. to 10:00 p.m. local time, Saturday, Sunday, and holidays.

C.4.18.3 By 5:30 a.m., Monday through Friday, the Contractor shall review all records/tickets created in the previous twenty-four (24) hours. Contractor shall ensure that all the records are properly assigned and contain all appropriate information. Contractor shall make appropriate corrections and take appropriate action to escalate problems that extend beyond service level commitments.

C.4.18.4 The Contractor shall issue Critical Problem Notices (CPNs) in accordance with USPTO procedures within fifteen (15) minutes of notification of major production outages or a major loss of functionality to multiple customers. CPNs must be updated and issued according to standard USPTO procedures. Contractors must use the information in the CPN as a basis for updating the System Status Page on the Web site.

C.4.19 Network Operations - Description (current staffing level - 35):

C.4.19.1 PTONet currently provides connectivity to over ten thousand (10,000) nodes, spread across eighteen (18) buildings in Crystal City as well as provides several wide-area network (WAN) links, or external connections, supporting the following activities:

- a. Internet connectivity;
- b. Contractors supporting USPTO;
- c. Connectivity to commercial AIS;
- d. PTONet services to employees working at home or on travel;
- e. PTONet services to PTDLs; and
- f. Connectivity to foreign Patent offices (EPO/JPO).

C.4.19.2 Network Operations is responsible for the operation and maintenance of USPTO's:

- a. LAN and WAN infrastructure.
- b. Network and office automation servers.
- c. Fiber optic and copper cable plant.

C.4.20 Network Operations - Network Operations Center (NOC) - Current Environment:

C.4.20.1 The USPTO currently utilizes HP-Openview Network Node Manager operating on HP-UX and Windows NT operating system to perform network management. HP-Openview is based upon Simple Network Management Protocol (SNMP) and Remote Monitor (RMON) protocols. The Contractor provides monitoring and reporting for all network devices managed by the Network Management System (NMS). The Contractor ensures maps on the NMS are accurate and up to date.

C.4.20.2 The Contractor currently uses Network Management Division's NMS to perform this function. The Contractor works with other USPTO offices to identify events that should be monitored and modifies NMS maps as necessary to successfully monitor events on those AISs. The Contractor responds to events and outages on those systems, contacts designated individuals responsible for supporting those systems, escalates as necessary, and reports on the progress of restoration. Procedures for such actions are outlined in the OSP.

C.4.21 Network Operations - Network Operations Center (NOC) - Requirements:

C.4.21.1 The Contractor shall provide, on-site, twenty-four (24) hours per day, seven (7) days per week NOC monitoring and reporting, and shall repair and correct all problems within two (2) hours of identification or notification.

C.4.21.2 The Contractor shall operate, maintain and upgrade, as authorized by the USPTO, the USPTO's NMS.

C.4.21.3 The Contractor shall provide technical assistance in the area of enterprise management of the USPTO AIS. The Contractor shall identify events that should be monitored and modify NMS maps as necessary to successfully monitor events on those AISs.

C.4.21.4 The Contractor shall perform periodic (hourly, per shift, daily) functional and performance testing of existing production network components, paths, networks, sub-networks, systems and software as required. Verification of all tests shall be recorded in an operations log.

C.4.22 Network Operations - Network Management - Current Environment:

C.4.22.1 Day-to-day operation, maintenance and system administration of the USPTO network infrastructure devices includes but is not limited to hardware and software on routers, hubs, switches, encryption devices, and security devices. These services are performed twenty-four (24) hours a day, seven (7) days a week. The Contractor gathers network performance and statistical data for problem analysis. The Contractor troubleshoots network problems by responding to trouble calls, performing fault isolation, and restoring service.

C.4.22.2 Currently the Contractor responds within ten (10) minutes of a failure or notification by either the Help Desk or NOC and resolves ninety-five percent (95%) of all network infrastructure problems within two (2) hours of the failure.

C.4.23 Network Operations - Network Management - Requirements:

C.4.23.1 The Contractor shall provide on-site network infrastructure support Monday through Friday, from 5:30 a.m. to 7:00 p.m. The contractor shall provide on-call support Monday through Friday 7:00 p.m. to 5:30 a.m. and twenty-four (24) hours a day on Saturday, Sunday, and Holidays.

C.4.23.2 The Contractor shall provide day-to-day operation, maintenance, and system administration of the USPTO network infrastructure devices.

C.4.23.3 The Contractor shall perform capacity management, security management, configuration management, and performance management on network infrastructure devices.

C.4.23.4 The Contractor shall support the operation of the USPTO's firewalls, to include the operating system, and the support of the Checkpoint firewall software.

C.4.23.5 The Contractor shall be responsible for upgrading network infrastructure hardware/software/firmware as directed. The Contractor shall produce an Installation Plan for all upgrades. The Contractor shall install upgrades approved by the USPTO. The USPTO shall provide hardware and software used in the upgrade.

C.4.23.6 The Contractor shall support the USPTO Office of Systems Architecture and Engineering (OSAE) as required during the implementation phase of major network engineering tasks.

C.4.23.7 The Contractor shall operate, maintain, and upgrade HP Node Manager, HP ITO, NetIQ, BMC (Patrol) and Nortel Optimity associated with the USPTO's NMS.

C.4.23.8 The Contractor shall perform preventive maintenance, operate, and maintain Nortel's Giga-bit Ethernet equipment.

C.4.23.9 The Contractor shall operate and maintain a Windows 2000 networking infrastructure.

C.4.24 Network Operations - Network and Office Automation Server - Current Environment:

C.4.24.1 Day-to-day operation, maintenance and system administration of the network and office automation servers is primarily focused on but is not limited to Windows NT servers, Microsoft Back Office suite of products, and third party commercial

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off the shelf (COTS) applications that support Windows NT servers. The Contractor responds to and fixes network and office automation server problems. These services are performed twenty-four (24) hours a day, seven (7) days a week. The Contractor gathers server performance and statistical data for problem analysis. The Contractor troubleshoots server problems by responding to trouble calls, performing fault isolation, and restoring service.

C.4.24.2 The USPTO currently uses Microsoft Systems Management Server (SMS) to perform software distribution.

C.4.24.3 The USPTO currently uses Microsoft Exchange for its electronic mail (e-mail) system.

C.4.24.4 The Contractor performs regularly scheduled preventative maintenance (PM) activities on the USPTO network and office automation servers. This includes PM on the operating system as well as on any applications supported by Network Operations Division (NOD) (e.g. Microsoft Exchange and SMS).

C.4.24.5 The Contractor routinely backs-up the USPTO Network and Office Automation servers and NMS servers per established standard operating procedures. The Contractor coordinates the periodic shipping of tapes to an offsite storage facility.

C.4.24.6 The Contractor provides the following network and office automation server administration tasks per the time frames outlined below:

Move PTOnet logon access to a different file server	Within three (3) days after receipt of request
Increase file server space (10 Mb or less)	Within three (3) days after receipt of request
Create new PTOnet shared space	As negotiated with business area
Create new E-mail account	Within one (1) day after receipt of request
Provide access to shared network server space	Within three (3) days after receipt of request
Creation/Modification of Exchange Distribution Lists	Within three (3) days after receipt
Creation of Network Print Queues	Within three (3) days after receipt of request

C.4.24.7 The Contractor is responsible for producing an installation plan for upgrading network and office automation infrastructure hardware/software/firmware. Only those upgrades approved by the USPTO are performed. The USPTO shall provide parts used in the upgrade.

C.4.24.8 The Contractor is responsible for placing into production all network and office automation devices which includes, but is not limited to receipt, initial inventory, set up, burn-in, testing, software loading, and deployment of hardware. In performing these services, the Contractor adheres to policies and procedures as established by the USPTO.

C.4.24.9 Currently the Contractor responds within ten (10) minutes of a failure or notification by either the Help Desk or NOC and resolves ninety-five percent (95%) of all network infrastructure problems within two (2) hours of the failure.

C.4.25 Network Operations - Network and Office Automation Server - Requirements:

C.4.25.1 The Contractor shall provide technical support to the USPTO for the day-to-day operation, maintenance and system administration of the USPTO network and office automation servers. This support shall be Monday through Friday, from 5:30 a.m. to 7:00 p.m. When on-site support is required outside of these hours, the contractor shall follow established escalation procedures to arrive at the designated site within sixty (60) minutes of notification by the NOC. The contractor shall provide on-call support Monday through Friday, 7:00 p.m. to 5:30 a.m. and twenty-four (24) hours a day, Saturday, Sunday, and Holidays and shall repair and correct all problems within two (2) hours of identification or notification.

C.4.25.2 The Contractor shall perform capacity management, security management, configuration management, and performance management on network and office automation server devices.

C.4.25.3 The Contractor shall operate, maintain and upgrade, as new releases are approved, the USPTO's software distribution utility and electronic mail system.

C.4.25.4 The Contractor shall perform regularly scheduled PM activities on the USPTO network and office automation servers.

C.4.25.5 The Contractor shall operate, maintain and upgrade, as new releases are approved, the USPTO's tape back up system.

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C.4.30 NT/UNIX Operating Systems Support - Requirements:

C.4.30.1 The Contractor shall provide technical support to maintain the production environment for the HP AIS Application servers running on the Windows NT Operating System and the HP/UX and Sun servers. This will include periodic software upgrades, as approved by the USPTO, to Windows NT Servers, UNIX servers (review existing available patches, install patches, etc.), and to all other vendor supported system software.

C.4.30.2 The Contractor shall provide technical support to develop, program, test and implement system software utilities for both the UNIX based and Windows NT based application platforms. All new programs and processes will operate in an "unattended operations" central computer environment.

C.4.30.3 The Contractor shall provide technical support and troubleshooting assistance for the application development community by answering questions on application interfaces to the operating system and identifying production anomalies to developers for their corrective action.

C.4.30.4 The Contractor shall provide technical support required for any necessary hardware upgrades and maintenance, including monitoring the performance of existing hardware. This task will be a continuous effort.

C.4.30.5 The Contractor shall provide support for day-to-day operational support, troubleshooting problem records assigned, and taking proper corrective actions. This may involve complete reloading of servers, intricate system administration troubleshooting, and proper corrective actions.

C.4.30.6 The Contractor shall assist the USPTO personnel in the installation of system software during non-production hours. The Contractor shall provide off-hour on-call support following the installation of any system software process or hardware. Non-production and off-hour support is defined as outside the principal period of performance hours. The Contractor shall periodically provide twenty-four (24) hour on-call support as assigned.

C.4.30.7 The Contractor shall provide on-site maintenance support for the UNIX and NT AIS servers Monday through Friday, 5:30 a.m. to 7:00 p.m.. The Contractor shall provide on-call maintenance support for the UNIX and NT AIS servers Monday through Friday, 7:00 p.m. to 5:30 a.m. and twenty-four (24) hours a day, Saturday, Sunday, and Holidays with a ten (10) minute response and, if required, arrive on-site within two (2) hours.

C.4.31 Data Base Administration (DBA) Support - Description (current staffing level - 7):

C.4.31.1 This involves ongoing activity in the areas of Oracle and BRS system software maintenance, Oracle database administration, and automation of database services within the Oracle Enterprise Manager (OEM) for Oracle databases as well as writing scripts to automate maintenance of the BRS file system.

C.4.32 Data Base Administration (DBA) Support - Current Environment:

C.4.32.1 The current Contractor is responsible for coding, testing and implementing any new program products, processes and scripts used to automate operational activities such as file reorganization, space management and resolutions to system alarms. The Task Manager or DBAD Manager approves test procedures, and new and revised documentation. The programming services provided included, but are not be limited to, the following:

- a. Analysis of the requirements;
- b. Development of the coding specification and detailed design;
- c. Development of programs, libraries, and/or scripts;
- d. Development of test scripts and data, (USPTO DBA shall assist in this parallel testing);
- e. Development of the installation plan and implementation of all processes and procedures;
- f. Development of documentation of the procedures and methodology applicable to the proper maintenance of the

program(s).

C.4.32.2 The Contractor documents operational procedures to completely describe any new processes and procedures. The Contractor logs, schedules and tracks all changes in EAMS. The Contractor or a member of the computer operations staff logs all problems resulting from any new processes and procedures in the EAMS. The Contractor also uses Oracle Meta-link to diagnose Oracle problems, track patches, and problem tickets. The Contractor is responsible for all corrections to that code and for repairs to the system or database.

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C.4.25.6 The Contractor shall operate, maintain and upgrade, as new releases are approved, hardware, software, and connectivity associated with the USPTO's Public Key Infrastructure (PKI) operating environment and Enterprise-Wide Login (EWL) infrastructure and shall perform related system administration functions.

C.4.25.7 The Contractor shall be responsible for upgrading to new releases as approved and placing into production network and office automation infrastructure hardware/software/firmware as directed.

C.4.26 Network Operations - Network Cabling - Current Environment:

C.4.26.1 The Contractor provides cable and infrastructure installation and maintenance for the network cable plant per the time frames outlined below:

Installations of network drops (regular)	Within fifteen (15) days after receipt of request
Installations of network drops (priority)	As negotiated with the customer and approved by the OCIO
Activation of network drops (five (5) or less)	Within one (1) day after receipt
Activation of network drops (five (5) or more)	Within five (5) days after receipt of request
Activation of network drops (priority)	As negotiated with the customer and approved by the OCIO
Deactivation of existing network drops	Within three (3) days after receipt of request

C.4.26.2 The Contractor arrives on-site to resolve all fiber optic cable outages within two (2) hours of notification of the problem and resolves ninety-five percent (95%) of all fiber optic cable problems within four (4) hours.

C.4.26.3 The Contractor arrives on-site to resolve all user network cable outages within two (2) hours of notification of the problem and resolves ninety-five percent (95%) of all user network cable outages within four (4) hours.

C.4.27 Network Operations - Network Cabling - Requirements:

C.4.27.1 The Contractor shall provide on-site network cabling support Monday through Friday, from 6:30 a.m. to 5:00 p.m. When on-site support is required outside of these hours, the contractor shall follow established escalation procedures to arrive at the designated location within sixty (60) minutes of notification by the NOC.

C.4.27.2 The Contractor shall provide day-to-day operation, maintenance of the USPTO's fiber optic and copper cable plant. The Contractor shall respond to and fix USPTO net cabling problems. These services shall be performed twenty-four (24) hours a day, seven (7) days a week, excluding Holidays observed by the USPTO.

C.4.27.3 The Contractor shall gather network performance and statistical data for problem analysis. The Contractor shall troubleshoot cabling problems by responding to trouble calls, performing fault isolation and restoring service.

C.4.27.4 The Contractor shall perform configuration management, capacity management, and cable and infrastructure installation and maintenance of the USPTO's cable plant.

C.4.27.5 The Contractor shall install, and test network cabling in accordance with policies and procedures as set by the USPTO.

C.4.28 NT/UNIX Operating Systems Support - Description (current staffing level - 7):

C.4.28.1 Provides support to the operations staff and application programmers by maintaining the Windows NT (servers only) and UNIX operating systems. This involves ongoing activity in the areas of system software, systems administration, TCP/IP, Internet services, hardware configuration upgrades, high availability software, and automated operations. Operating system support involves the maintenance/upgrades to products from Microsoft, Input Accel, Wang, Kodak, HP, Sun, and other vendors.

C.4.29 NT/UNIX Operating Systems Support - Current Environment:

C.4.29.1 The Contractor currently provides technical services to maintain the production environment for the HP AIS Application servers running on the Windows NT Operating System and the HP/UX and Sun servers. This includes periodic upgrades to Windows NT Servers, UNIX Servers and all other vendor supporting system software.

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C.4.32.3 The Contractor shall participate with the USPTO in the current effort to standardize the implementation of Oracle databases and improve the management and maintenance for the Oracle production and test environments at the USPTO. The Contractor must be able to demonstrate skill with the OEM version 2.0.4 and must incorporate all Oracle maintenance and management programs, scripts or actions to resolve alerts in OEM.

C.4.33 Data Base Administration (DBA) Support - Requirement:

C.4.33.1 The Contractor shall provide on-site technical support from 6:00 p.m. to 6:00 a.m. Monday through Friday and provide twenty-four (24) hour support Saturday, Sunday, and holidays, for technical services to monitor and maintain the Oracle and BRS production and test databases running on HP-UX and HP-NT servers. This shall include periodic software upgrades to the Oracle and BRS software.

C.4.33.2 The Contractor shall provide technical support and troubleshooting assistance for the application development community by answering questions on application interfaces to the operating system and identifying production anomalies to developers for their corrective action.

C.4.33.3 The Contractor shall provide subject matter experts for special projects as requested. The Contractor shall study issues as it relates to the USPTO environment and shall document that analysis along with an action plan to remedy a problem, initiate a process or procedure, roll out products onto the appropriate servers and/or enhance current operations. This subject matter expert shall mentor both the USPTO and Contractor personnel as necessary in the expertise.

C.4.34 User ID and Password Administration - Description (current staffing level - 6):

C.4.34.1 Responsible for the administration of all user ID's and Passwords to PTONet Systems.

C.4.35 User ID and Password Administration - Current Environment:

C.4.35.1 Currently the Contractor is fulfilling ninety-five percent (95%) of the following request per the time frames outlined below:

Create new PTONet Login ID and Password	Within 1 day after receipt of approved request
Create Mail@Home ID and have materials ready for user	Within three (3) days after receipt of approved request
Create new E-mail account	Within one (1) day after receipt of approved request
Create new firewall ID	Within one (1) day after receipt of approved request
After verifying the identity of a user, create a new PKI certificate or renew an existing certificate and provide user with an identification number and authorization code.	Within one (1) day after receipt of approved request
Move PTONet logon access to a different file server	Within three (3) days after receipt of request
Delete PTONet ID, firewall ID, E-mail ID, and Mail@Home ID	Within one (1) day after receipt of request
Revoke PKI certificates and recover PKI keys.	Within three (3) days after receipt of request

C.4.36 User ID and Password Administration - Requirements:

C.4.36.1 The Contractor shall provide on-site Login and Password administration support 5:30 a.m. to 12:00 a.m.(midnight), Monday - Friday, excluding Holidays observed by the USPTO.

C.4.36.2 The Contractor shall provide technical assistance in the area of enterprise management for the USPTO AIS Login ID's and Passwords using the EWL system. The Contractor shall respond to events and outages on EWL, contact designated individuals responsible for supporting those systems, escalate as necessary, and report on the progress of restoration.

C.4.36.3 The Contractor shall conduct security audits as requested by the USPTO.

C.4.37 Technical Writing/Document Development - Description:

C.4.37.1 Responsible for developing, delivering and distributing informational end user documentation, Technical Notes, and technical writings for the Help Desk's Intranet web site.

C.4.38 Technical Writing/Document Development - Current Environment (current staffing level - 4):

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C.4.38.1 The Contractor assists in the fulfillment and distribution of publications.

C.4.39 Technical Writing/Document Development - Requirements:

C.4.39.1 The Contractor shall prepare user and service guides pertaining to the use of COTS software and government developed software applications. The Contractor shall develop user guides using PageMaker 6.5 software matching the publication specifications and technical standards established by the USPTO. For each user or service guide, the Contractor shall be responsible for delivering a camera-ready PageMaker 6.5 document in both electronic and hard copy formats within three weeks from initial assignment. The contractor will be required to meet with the USPTO management, service providers, and end users, in determining scope, content, and procedural issues contained in each guide. The development of new guides, along with existing guides requiring revision, will be required at the approximate rate of two (2) or three (3) per month.

C.4.39.2 The Contractor shall assist in preparing CIO News, an information technology newsletter produced quarterly from the OCIO. The Contractor support includes the authoring of information technology and office automation articles; layout and design of each issue; printing and distribution of each issue. The contractor will be required to meet with the USPTO management, service providers, and end users, in determining scope and content of each issue.

C.4.39.3 The Contractor shall assist in creating Technical Notes for use by OCIO staff personnel and OCIO Help Desk personnel. Each Technical Note must be developed in accordance with the OCIO Technical Notes Directives System, must be approved by Customer Information Services Division (CISD), and must be made available in both electronic and hard copy formats. The contractor will be required to meet with the USPTO management, service providers, and end users, in determining procedural issues that are required for each Technical Note.

C.4.39.4 The Contractor shall provide a Technical Writer to support Help Desk documentation requirements. These requirements consist of Knowledge Pak documentation and written documentation for the Help Desk Web site.

C.4.40 Warehouse Operations - Description (current staffing level - 7):

C.4.40.1 The Warehouse Operations task supports a variety of different requirements. The Warehouse serves as the: single point of shipping and receiving for IT equipment (includes CPU, monitor, printer, etc); single point of process, for property management purposes and for all delivered IT equipment; point of process Return Merchandise Authorization (RMA) requests for defective equipment; and, the point of process for excess equipment. Also provided under the Warehouse Operations task is the delivery of equipment to the USPTO campus for installation and the removal of equipment from the USPTO campus for excessing.

C.4.41 Warehouse Operations - Current Environment:

C.4.41.1 The contractor currently scans all new equipment delivered to the warehouse within two (2) working days from date of receipt, for example, if delivery occurs on Monday, all assets must be scanned by COB Wednesday.

C.4.41.2 The contractor currently is responsible for scanning all assets brought to the warehouse for immediate excess, within three (3) working days and within ninety-eight percent (98%) accuracy or the incorrect skids will be redone at no additional cost to the government.

C.4.41.3 The contractor currently sends the list of recently delivered hardware to the COTR within four (4) hours of receipt of the hardware at the warehouse.

C.4.41.4 The contractor currently conducts all warehouse activities in an ISO 9000 certified facility which is approximately 9,000 square feet in size.

C.4.42 Warehouse Operations - Requirements:

C.4.42.1 The contractor shall provide support from 6:30 a.m. to 4:30 p.m., Monday through Friday.

C.4.42.2 Contractor shall provide a facility located in Virginia, within a 5-mile radius of the USPTO.

C.4.43 Hardware Maintenance - Description (current staffing level - 1):

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C.4.43.1 Provide both hardware and operating system software support for a variety of hardware platforms. This hardware includes servers, scanners and printers (anything not covered as part of a desktop unit).

C.4.44 Hardware Maintenance - Current Environment:

C.4.44.1 Currently maintenance of the equipment is provided through a variety of contracts, warranties and purchase orders, that either the USPTO manages or are performed as part of the USPTO contracts. This includes Promark printers, Xerox printers, and Fujitsu scanners.

C.4.45 Hardware Maintenance - Requirements:

C.4.45.1 See Attachment "Hardware Listing" for list of equipment to be supported.

C.4.45.2 Future Requirements. In reference to the column entitled "Maintenance Required Current/Future", Contractor is not required, at this time, to provide pricing information for those items designated "Future." This is for informational purposes only and to provide notice that at some point during the contract life, at the option of the USPTO, the USPTO anticipates that the maintenance of those items will become the responsibility of the Contractor.

C.4.46 Carlyle Move (Future Requirement #1):

C.4.46.1 The contractor may perform the following:

- a. Client-Equipment Relocation Support - includes all IT equipment not located in the Data Center, Emerging Technology Center, CPK3-4th floor data center, or other remote "data centers" as identified by USPTO. Includes such equipment as personal-computer workstations (includes desktop printers and scanners), high-speed printers, high-speed scanners, etc. This area may also include the relocation of general office equipment such as photocopiers and facsimile machines.
- b. Server-Equipment Relocation Support - includes all IT equipment located in the Data Center, Emerging Technology Center, CPK3-4th floor data center, or other remote "data centers" as identified by USPTO. Includes such equipment as NT servers, UNIX servers, mass storage, tape libraries, high-speed scanners and high-speed printers.
- c. Telecommunication Support - includes the operation, administration and support of the USPTO voice communications system(s). The voice system and support includes; help desk support for telephone problems and repairs, telephone repair support, voice-messaging administration and support, PBX administration and maintenance for telephone equipment. (Includes maintaining the telephone number system within the PBX call accounting system and the assignment of new telephone numbers, changes, and deletions. The support would also include ordering, tracking and bill reconsolidation of services from the telephone company, including remote access (i.e., work at home) telephone support, and video teleconferencing support.

C.4.47 Inventory Support (Future Requirement #2):

C.4.47.1 The purpose of this task is to provide the USPTO with maintenance services for the inventory module within the EAMS. These services shall be in the form of data maintenance and inventory verification support. The activities in this task include: inventory support, quality assurance, financial reconciliation, training, and documentation.

C.4.47.2 Inventory support includes:

- a. Execution of the Asset Management guidelines and schedules of activities as determined by the USPTO's Asset Management Team.
- b. Distribution of monthly Property Custodian report packages.
- c. Updates to the systems based on the custodian reports and other asset management forms (Home Use, Transfer of Assets, etc) and ensure all updates are made correctly and within the required time frames. Processing of these reports should be within ninety-five percent (95%) accuracy and within forty-eight (48) hours of receipt.
- d. Maintenance of the official Property Custodian listing.
- e. Issuance of all Department of Commerce provided bar code labels (i.e., CD bar code labels).
- f. Creation and issuance of all non-Department of Commerce provided bar code labels.
- g. Processing of surplus reports.
- h. Receive and process on a daily basis collected data from either the Psion Workabout or Radio units.
- i. Daily and weekly reconciliation of the "To-Be Assigned" Property Custodian listing ensuring that all assets are properly assigned with ninety-five percent (95%) accuracy.
- j. Adding new asset descriptions as assets are deployed.
- k. Standardization of asset descriptions for existing and newly acquired assets.

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C.4.47.3 Quality assurance includes:

- a. Physically observing and validating 10% of the assets on the custodian's current Property Custodian report and 10% of the assets found in the custodian's area to their current Property Custodian report.
- b. Property Custodian Quality Assurance package must be completed in the system and provided to the PTO within two (2) business days after completion of the verification.
- c. Performing weekly data quality fieldwork to ensure the validity of the asset data is at a minimum ninety-five percent (95%) accurate at all times. Special emphasis should be placed on the following:
 - (1) Assets with "Not Accessible" in the serial number field.
 - (2) Assets with "duplicate" serial numbers.
 - (3) Assets with "unusual" serial number configurations.

C.4.47.4 Financial reconciliation includes:

- a. Performing financial reconciliation activities for all assigned financial documents. Such activities may require interaction with designated USPTO employees, Property Custodians, and/or contractors.
- b. Assignments must be completed within five (5) business days from the assigned date.
- c. Providing a weekly status of all assignments.

C.4.47.5 Training and documentation includes:

Providing the training, documentation, and classes to support all Asset Management functions in the hand-held units. Such classes are on an "as needed basis" but shall not exceed twenty (20) classes per month.

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SECTION D -- PACKAGING AND MARKING

D.1 PACKING AND MARKING

(a) Packing, labeling and marking of some items to be delivered under this contract must comply with the Statement of Work and with instructions to be provided by the Contracting Officer's Technical Representative.

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SECTION E -- INSPECTION AND ACCEPTANCE

E.1 52.252-02 CLAUSES INCORPORATED BY REFERENCE

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. Also, the full text of a clause may be accessed electronically at this address: <http://www.arnet.gov/>

Clause	Title	Date
52.246-06	Inspection--Time-And-Material And Labor-Hour	May 2001

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SECTION F -- DELIVERIES OR PERFORMANCE

F.1 52.252-02 CLAUSES INCORPORATED BY REFERENCE

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. Also, the full text of a clause may be accessed electronically at this address: <http://www.arnet.gov/>

Clause	Title	Date
52.242-17	Government Delay Of Work	April 1984

F.2 IDENTIFICATION OF CONTRACT DELIVERABLES

Unless otherwise specified, all documents prepared and submitted by the Contractor to the Government under this contract shall include the following information on the cover page of each document:

- Name and business address of the Contractor;
- Contract number and task order number;
- Date of report; and
- Name and office location of the COTR

F.3 DELIVERABLES

Each task order will specify the deliverables to be produced by the Contractor and the delivery date. All documentation deliverables shall be submitted first in draft form. The Government will have up to fifteen (15) working days to determine the acceptability of all completed draft deliverables and ten (10) working days to determine the acceptability of all completed final deliverable. Deficiencies in draft and final deliverables shall be corrected by the Contractor within ten (10) working days of notification by the Government. In addition to the services required under the contract, the Contractor shall be required to provide the following deliverables, after completion of each PTO task order:

- Deliverables stated in each of the assigned task orders.
- Monthly Status Reports (See Section F.5 "MONTHLY STATUS REPORT")

F.4 GOVERNMENT HOLIDAYS

The following legal holidays are observed by this contract:

New Year's Day	January 1
Thanksgiving Day	Fourth Thursday in November
Christmas Day	December 25

The Contractor shall comply with the aforementioned Government holidays and any other day designated by Federal Statute, Executive Order, or Presidential proclamation, therefore, the Government offices are closed to the Contractor's staff on the day(s) these holidays are observed. In addition, work may not be required of the Contractor when Federal employees are released from work early due to inclement weather conditions or when Federal offices are closed due to inclement weather conditions. The COTR will notify the Contractor when early release of Federal employees has been authorized.

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F.5 MONTHLY STATUS REPORT

The Contractor shall submit a monthly status report, covering the first day of the month through the last day of the month. One (1) copy each of the status report is due, in electronic format, to the COTR and the CO seven (7) working days following the last day of the month. The format for the status report shall include a contract summary sheet to include the contract number and title, a task by task status report, a summary of problems, and a summary of expenditures. Each task in progress shall be summarized to identify the Task Order Manager for both the USPTO and the Contractor, the task objective, progress, planned activities, information about deliverable status, and problems. The problem summary section shall describe any problems and proposed solutions, if applicable, and problem resolutions. The expenditures section shall summarize tabularly and/or graphically estimated costs and labor hours, overall and by task. Data shall include:

- (1) Labor hours and dollar amounts expended for each labor category from the effective date of the contract thru the last day of the current reporting month;
- (2) Labor hours and dollar amount expended by category during the current reporting month;
- (3) Estimates of labor hours (by category) to be expended during the next reporting month; and
- (4) Identification of direct labor hours of prime Contractor and subcontractor(s), if applicable.

In addition to the monthly status report, the COTR will have the Contractor generate other reports as necessary.

F.6 PERIOD OF PERFORMANCE

The period of performance of this contract is as follows:

- Base Year: July 3, 2002 - June 30, 2003
- Option Year 1: July 1, 2003 - June 30, 2004
- Option Year 2: July 1, 2004 - June 30, 2005
- Option Year 3: July 1, 2005 - June 30, 2006
- Option Year 4: July 1, 2006 - June 30, 2007
- Option Year 5: July 1, 2007 - June 30, 2008
- Option Year 6: July 1, 2008 - June 30, 2009
- Option Year 7: July 1, 2009 - June 30, 2010
- Option Year 8: July 1, 2010 - June 30, 2011
- Option Year 9: July 1, 2011 - June 30, 2012

F.7 PLACE OF DELIVERY

The deliverable items to be furnished hereunder shall be delivered to the COTR as named in Section G of the contract.

F.8 PLACE OF PERFORMANCE

The effort required under this contract shall be performed at the USPTO currently located in Arlington, VA, the Contractor's facilities and/or other sites designated by the USPTO. Each task order will specify the place of performance.

F.9 PRINCIPAL PERIOD OF PERFORMANCE

The principal period of performance will be specified in each task order.

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SECTION G -- CONTRACT ADMINISTRATION DATA

G.1 CONTRACT ADMINISTRATION

Notwithstanding the Contractor's responsibility for total management during the performance of this contract, the administration of the contract will require maximum coordination between the Government and the Contractor. The following individuals will be the Government point of contact during the performance of the contract.

A. Contracting Officer's Technical Representative (COTR)

(1) The COTR will be designated on authority of the CO to monitor all technical aspects and assist in administering the contract. The types of actions within the purview of the COTR's authority are to assure that the Contractor performs the technical requirements of the contract; to perform or cause to be performed inspection necessary in connection with Contract concerning the aspects of the contract within his/her purview; to issue written interpretations of technical requirements of the Government drawings, designs, and specifications; to monitor the Contractor's performance under the contract and notify the Contractor and CO of any deficiencies observed; and to coordinate Government-Furnished Property availability and provide for site entry of Contractor personnel, if required. A letter of designation will be issued to the COTR with a copy supplied to the Contractor, stating the responsibilities and limitations of the COTR. This letter will clarify to all parties to this contract the responsibilities of the COTR.

(2) Tom King, is hereby designated as the COTR. The COTR may be changed at any time by the Government without prior notice to the Contractor but notification of the change, including the name and address of the successor COTR, will be promptly provided to the Contractor by the CO in writing.

NAME: Tom King
ADDRESS: U.S. Patent and Trademark Office
Office of Chief Information Officer
21211 Crystal Drive
Crystal Park Two, Suite 1002
Arlington, VA 22202
PHONE: (703) 305-8999

(3) The responsibilities and limitations of the COTR are as follows:

(a) The COTR is responsible for the technical aspects of the project and technical liaison with the Contractor. The COTR is also responsible for the final inspection and acceptance of all reports, and such other responsibilities as may be specified in the contract.

(b) The COTR is not authorized to make any commitments or otherwise obligate the Government or authorize any changes which affect the scope of work, contract price, or other mutually agreed upon terms or provisions of the contract. Any Contractor request for changes shall be referred to the Contracting Officer (CO) directly or through the COTR. No such changes shall be made without the expressed prior authorization of the CO. The COTR may designate assistant COTR(s) to act for him/her by naming such an assistant in writing and transmitting a copy of such designation through the CO to the Contractor.

B. Task Manager(s)

All Task Manager(s) will be designated on authority of the CO to monitor all day-to-day aspects of task orders in conjunction with the COTR. The Task Managers will have the equivalent authority as the COTR under the contract with regard to the specific task assigned. The Task Manager(s) will be designated in all task orders.

C. Contracting Officer (CO)

All contract administration will be effected by the CO. Communications pertaining to contract administration matters will be addressed to the CO. No changes in or deviation from the scope of work shall be effected without a Supplemental Agreement executed by the CO authorizing such changes.

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G.2 CONTRACT ADMINISTRATIVE OFFICE

This contract will be administered by:

NAME: Office of Procurement
ADDRESS: U.S. Patent and Trademark Office
Office of Procurement
2011 Crystal Drive
Crystal Park One - Suite 810
Arlington, VA 22202
PHONE: (703) 305-8014

Written communications to the CO shall make reference to the contract number and shall be mailed to the above address.

G.3 CONTRACTING OFFICER'S AUTHORITY

The CO is the only person authorized to make or approve any changes in any of the requirements of this contract and notwithstanding any provisions contained elsewhere in this contract, the said authority shall remain solely with the CO. In the event the Contractor makes any changes at the direction of any person other than the CO, the change will be considered to have been made without authority and no adjustment will be made in the contract price to cover any increase in costs incurred as a result thereof.

G.4 SEGREGATION OF COSTS BY TASK ORDER

As referenced in Section G clause entitled, "SUBMISSION OF INVOICES," all costs shall be accumulated and invoiced by individual task order for billing purposes.

G.5 SUBMISSION OF INVOICES

The Contractor shall submit proper invoices on a monthly basis for payment one (1) original and two (2) copies of each invoice shall be submitted for each task order. Invoices shall, if applicable, deduct the withholding amount as specified in FAR 52.232-7, Payments Under Time-and-Materials and Labor-Hour Contracts APR 1984), contained in Section I "CONTRACT CLAUSES" of this contract. All invoices shall be submitted to the following address:

Courier or Hand Delivery
U.S. Patent and Trademark Office
Office of Finance
2011 Crystal Drive - Suite 802B
Arlington, VA 22202

U.S. Mail Delivery
U.S. Patent and Trademark Office
Office of Finance
2011 Crystal Drive, Box 17
Washington, DC 20231

To constitute a proper invoice, each invoice submitted must include the following information and attached documentation:

- (1) Name of the Contractor, invoice number and invoice date;
- (2) Contract number and task order number (one per invoice);
- (3) Description, price, and quantity of services actually delivered or rendered;
- (4) Name of Personnel performing the service, Labor-Hour Category, number of hours worked and cost;
- (5) Payment terms;
- (6) Name and signature of certifying official, title, phone number, and complete mailing address of responsible office to whom payment is to be sent;

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- (7) Period of performance covered by the invoice;
- (8) Other substantiating documentation or information as required by the contract; and
- (9) The following statement on the reverse side of the original of each invoice:

COTR'S CERTIFICATION:

I certify to the best of my knowledge and belief that the services/products shown on the invoice have been performed and are accepted.

COTR Signature

Date

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SECTION H -- SPECIAL CONTRACT REQUIREMENTS

H.1 ACCESS TO GOVERNMENT FACILITIES

During the life of the contract, the rights of ingress and egress to and from the Government facility for Contractor personnel shall be made available as required per each individual task order. During all operations on Government premises, Contractor personnel shall comply with the rules and regulations governing the conduct of personnel and the operation of the facility. The Government reserves the right to require Contractor personnel to sign in upon ingress and sign out upon egress to and from the Government facility.

H.2 CONTRACT TYPE

This is a labor-hour and time and material type contract.

H.3 DUPLICATION AND DISCLOSURE OF CONFIDENTIAL DATA

Duplication or disclosure of confidential data provided by the USPTO or to which the Contractor will have access as a result of this contract is prohibited. It is understood that throughout performance of the contract the Contractor may have access to confidential data which is the sole property of the USPTO, as well as access to proprietary data which is the sole property of other than the contracting parties. The Contractor hereby agrees to maintain the confidentiality of all such data to which access may be obtained throughout contract performance whether title thereto vests in the USPTO or otherwise. The Contractor hereby agrees not to disclose said data, any interpretations thereof or data derivative therefrom, to unauthorized parties in contravention of these provisions without prior written approval of the CO or the party in which title thereto is wholly vested. This clause also applies to any subcontractors and/or consultants used by the Contractor.

H.4 DUPLICATION OF EFFORT

The Contractor hereby certifies that costs for work to be performed under this contract and any subcontract hereunder are not duplicative of any costs charged against any other Government contract, subcontract or other Government source. The Contractor agrees to advise the CO, in writing, of any other Government contract or subcontract it has performed or is performing which involves work directly related to the purpose of this contract. The Contractor also certifies and agrees that any and all work performed under this contract shall be directly and exclusively for the use and benefit of the Government, not incidental to any other work, pursuit, research or purpose of the Contractor, whose responsibility it will be to account for it accordingly.

H.5 GOVERNMENT AND CONTRACTOR FURNISHED FACILITIES AND EQUIPMENT

The USPTO will provide the Contractor with access to any aspect of its automated environment and to any existing documentation needed to carry out this project. The USPTO will provide space to the Contractor when space is available for this effort. The Contractor shall be responsible for its own leasing arrangements i.e., Warehouse Space reference C.4.40 - C.4.42. The USPTO will not provide any Government-furnished equipment under this contract, except as specifically provided in Section C.

H.6 GOVERNMENT FURNISHED DATA

The Government shall deliver to the Contractor, as may be requested, Government-Furnished Data (GFD) during the performance of this contract. GFD will be delivered to the Contractor as specified in each task order.

Title to GFD shall remain in the Government, and the Contractor shall use the GFD only in connection with this contract.

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Upon completion or termination of this contract, the Contractor shall return to the Government all GFD.

H.7 GOVERNMENT INVESTIGATION/SUITABILITY INVESTIGATION REQUIREMENTS

Contract Language for use by Contracting Officers for Low Risk and Moderate Risk Contracts

Contractors -

Each contract employee working for over 180 days under this contract must undergo investigative processing. The investigation that will be conducted by the Office of Personnel Management (OPM) is a National Agency Check with Inquires (NACI).

(NOTE: Low Risk contracts whose duration is less than 180 days do not ordinarily require processing. However, even though the contract is short in duration, based on any unusual circumstances that may exist, Special Agreement Checks (SACs) may be requested, at the discretion of the Contracting Officer's Technical Representative (COTR) and/or the USPTO Security Office.)

Investigative Processing -

The COTR, in conjunction with the contractor's Project Manager, is responsible for initiating and ensuring the accuracy and completeness of the investigative package for each contract employee. Once the packages have been reviewed, packages will then be forwarded to the USPTO Security Office for further processing, e.g., fingerprinting, etc. Investigative paperwork must be submitted to the USPTO Security Office and forwarded to the OPM within 14 days after the Subject's performance on the contract.

Processing Requirements -

The investigative package must contain the following investigative forms: SF-85, Questionnaire for Non Sensitive Positions; FD 258, Fingerprint Chart; and the OF 306, Declaration for Federal Employment.

Non U.S. citizens to be employed under this contract must:

- a. Have official legal status in the United States; and
- b. Have continuously resided in the United States for the last 2 years

If the USPTO Security Office receives disqualifying information on a contract employee, the Contractor, upon notice, will immediately remove the employee from their duties under this contract. Contract employees may be barred from working on the premises of a facility for any of the following:

- a. Falsification of information entered on the investigative forms.
- b. Conviction of a felony of a crime of violence or of a misdemeanor involving moral turpitude.
- c. Improper conduct once performing on the contract, including criminal, infamous, immoral, or notoriously disgraceful conduct or other conduct prejudicial to the Government regardless of whether the conduct directly relates to the contract.
- d. Any behavior judged to pose a potential threat to USPTO personnel or property.

Failure to comply with these requirements may result in the cancellation of this contract.

H.8 INSURANCE COVERAGE

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Pursuant to the clause "Insurance - Work on a Government Installation (FAR 52.228-5)," the Contractor will be required to present evidence to show, at a minimum, the amounts of insurance coverage indicated below:

a. Workers Compensation and Employer's Liability. The Contractor is required to comply with applicable Federal and State workers' compensation and occupational disease statutes. If occupational diseases are not compensable under those statutes, they shall be covered under the employer's liability section of the insurance policy, except when contract operations are so commingled with a Contractor's commercial operations that it would not be practical to require this coverage. Employer's liability coverage of at least \$100,000 shall be required, except in states with exclusive or monopolistic funds that do not permit workers' compensation to be written by private carriers.

c. Automobile Liability. The Contractor shall have automobile liability insurance written on the comprehensive form of policy. The policy shall provide for bodily injury and property damage liability covering the operation of all automobiles used in connection with performing the contract. Policies covering automobiles operated in the United States shall provide coverage of at least \$200,000 per person and \$500,000 per occurrence for bodily injury and \$20,000 per occurrence for property damage.

d. Aircraft Public and Passenger Liability. When aircraft are used in connection with performing the contract, the Contractor shall have aircraft public and passenger liability insurance. Coverage shall be at least \$200,000 per person and \$500,000 per occurrence for bodily injury, other than passenger liability, and \$200,000 per occurrence for property damage. Coverage for passenger liability bodily injury shall be at least \$200,000 multiplied by the number of seats or passengers, whichever is greater.

H.9 KEY PERSONNEL

A. The Contractor shall assign to this contract the following key personnel:

Labor Categories

Program Director
 Project Manager
 Quality Manager
 Customer Services Manager
 Help Desk Task Manager
 Field Engineer Task Manager
 Asset Manager

B. During the first 180 days of performance, the Contractor shall make no substitutions of key personnel unless the substitution is necessitated by illness, death, or termination of employment. The Contractor shall notify the CO within fifteen (15) calendar days after the occurrence of any of these events and provide the information required by paragraph (c) below. After the initial 180-day period, the Contractor shall submit the information required by paragraph (c) to the CO at least fifteen (15) days prior to making any permanent substitutions.

C. The Contractor shall provide a detailed explanation of the circumstances necessitating the proposed substitutions, complete resumes for the proposed substitutes, and any additional information requested by the CO. Proposed substitutes should have comparable qualifications to those of the persons being replaced. The CO will notify the Contractor within fifteen (15) calendar days after receipt of all required information of the decision on substitutions. The contract will be modified to reflect any approved changes of key personnel.

H.10 NOTICE TO THE GOVERNMENT OF DELAYS

In the event the Contractor encounters difficulty in meeting performance requirements, or when it anticipates difficulty in complying with the contract delivery schedule or date, or whenever the Contractor has knowledge that any actual or potential situation is delaying or threatens to delay the timely performance of this contract the Contractor shall immediately notify the CO and the COTR, in writing,

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giving pertinent details, provided, however, that this data shall be informational only in character and that this provision shall not be construed as a waiver by the Government of any delivery schedule or date or of any rights or remedies provided by law or under this contract.

H.11 OPTION TO EXTEND THE TERM OF THE CONTRACT

The Government may extend the term of this contract by unilateral modification to the contract on or before the last day of the applicable period of performance.

If the Government exercises this option, the extended contract shall be considered to include this option provision.

The total duration of this contract, including the exercise of any options under this clause, shall not exceed ten (10) years from the effective date of this contract.

Exercise of this option shall be in accordance with Section F clause entitled, "PERIOD OF PERFORMANCE."

H.12 ORGANIZATIONAL CONFLICT OF INTEREST

A. The Contractor warrants that, to the best of the Contractor's knowledge and belief, there are no relevant facts or circumstances which could give rise to an organizational conflict of interest, as defined in FAR Subpart 9.5, or that the Contractor has disclosed all such relevant information.

B. The Contractor agrees that if an actual or potential organizational conflict of interest is discovered after award, the Contractor will make a full disclosure in writing to the CO. This disclosure shall include a description of actions which the Contractor has taken or proposes to take, after consultation with the CO, to avoid, mitigate, or neutralize the actual or potential conflict.

C. Remedies. The CO may terminate this contract for convenience, in whole or in part, if it deems such termination necessary to avoid an organizational conflict of interest. If the Contractor was aware of a potential organizational conflict of interest prior to award or discovered an actual or potential conflict after award and did not disclose or misrepresented relevant information to the CO, the Government may terminate the contract for default, debar the Contractor from Government contracting, or pursue such other remedies as may be permitted by law or this contract.

D. The Contractor further agrees to insert provisions which shall conform substantially to the language of this clause, including this paragraph (d), in any subcontract or consultant agreement hereunder.

H.13 OVERTIME

Unless otherwise provided in this contract, the Contractor shall not perform overtime work under or in connection with this contract for which premium compensation is required to be paid, without specific written approval from the CO.

H.14 RIGHTS IN DATA

The Government shall have unlimited rights in software first produced in the performance of this contract. For the purposes of this clause, "software first produced in the performance of this contract" shall include, but not be limited to the following: non-COTS computer programs developed or previously developed and implemented by the Contractor in the performance of this contract, related computer data bases and documentation thereof, source code, object code, algorithms, library code, library routine, and technical data of all software first produced in the performance of this contract. For the purposes of this clause, "unlimited rights" shall mean the right of the USPTO, at no extra cost to the USPTO or recipients, to use, disclose, reproduce unlimited copies, prepare derivative

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works, distribute unlimited copies to the public and foreign government patent offices, and perform publicly and display publicly, in any manner and for any purpose, and to have or permit others to do so.

H.15 SECRECY AND USAGE OF PATENT INFORMATION

Work under this contract does not affect the national security. However, patent applications are required by law (35 U.S.C. 22) to be kept in confidence. Information contained in any patent application file(s) is restricted to authorized Contractor personnel on a need-to-access basis.

The Contractor acquires no right or privilege to use or disclose any information contained in any patent application file (in any form whatsoever) except to perform the work under the contract. Further, the Contractor shall not copyright or make any use or disclosure whatsoever of any patent information contained in any application or related copy or data furnished the Contractor by the Government or obtained therefrom except performing the requirements of this contract.

Security requirements of patent application file data maintained in a computer-accessible medium are an extension of the security requirements for the hard copy or the patent application folders. All processing, storage or transmission of patent application file data by means of electronic communications systems is prohibited unless use of such systems is approved by the USPTO.

All personnel having access to patent application files or data or information concerning the same, must take the following at or affirmation, signed in writing:

"I do swear or affirm that I will preserve the applications for patents in secrecy, that I will not divulge any information concerning the same to unauthorized persons while employed in work under this contract or at any time thereafter; and that I take this obligation freely, and without mental reservation or purpose of evasion."

Each employee's signed oath, or affirmation, shall be retained in the Contractor's file, subject to inspection by authorized Government representatives.

Without advance notice, the Government shall have the right to inspect the Contractor's premises, records, and work in process pertaining to the secrecy of patent information.

H.16 SUPERVISION OF CONTRACTOR'S EMPLOYEES

Personnel assigned to render services under this contract shall at all times be employees of the Contractor or its subcontractor(s) and under the direction and control of the Contractor. Notwithstanding any other provisions of this contract, the Contractor shall at all times be responsible for the supervision of its employees in the performance of the services required hereunder.

Contractor personnel shall not at any time during the contract period be employees of the U.S. Government.

H.17 TASK ORDER PROCEDURES

All work shall be initiated only by issuance of a task order fully executed by the CO. The Government is only liable for Labor hours expended under the terms and conditions of this contract to the extent that a fully executed task order has been issued and covers the required work. Charges for any work not authorized will be disallowed.

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The designated COTR will initiate the task order process by preparing a statement of requirements and/or objectives to be achieved which includes performance measures in the form of a Task Objective Statement (TOS). The Contractor shall meet with the COTR to mutually discuss and agree upon the requirements and/or objectives to be achieved.

The Contractor shall prepare a proposal in response to the TOS incorporating the results of the discussions and forward it to the COTR for approval. The proposal shall contain the effective date of the task order, and the COTR and designated Task Manager's names as delineated in the TOS, a detailed description of the functional or other objectives to be achieved, a schedule for completion of the task order, any deliverables to be provided by the task order, any Government-furnished equipment, any Contractor-furnished items required, the labor categories required, the anticipated level of effort, and a cost ceiling.

Upon approval of the proposal by the COTR the final task order statement of work will be forwarded to the CO for execution and issuance.

The Contractor shall acknowledge receipt of each task order by returning to the CO a signed copy of the task order within two (2) work days after receipt. The Contractor shall begin work on the task order in accordance with the effective date indicated on the task order.

Following execution of the task order, technical clarifications may be issued in writing at any time by the designated COTR to amplify or provide additional guidance to the Contractor regarding performance of the task order. The Contractor shall notify the CO of any instructions or guidance the Contractor considers to be a change to the task order which will impact the cost, schedule or deliverables content of the baseline work plan. In cases where technical instructions or other events may dictate a change from the baseline, task orders may be formally modified in writing by the CO to reflect changes to tasking.

The Contractor shall not exceed the ceiling price established in each Task Order. If at any time the Contractor has reason to believe that the total amount for the Task Order, will exceed 80% (percent) of the ceiling price specified in the order, the Contractor shall notify the CO. Such notification shall include an estimate of the additional amount and, if necessary, additional time required for completion of the ordered work.

Task orders may be placed during the period of performance of the contract. Labor rates applicable to hours expended in performance of an order will be the contract rates that are in effect at the time the task order is executed. Any order issued during the period of performance of this contract and not completed within that time shall be governed by the contract terms to the same extent as if the order were completed during the contract's period of performance, including the contract and individual order ceiling prices. Work performed on such orders after the end of the contract's period of performance shall continue to be charged at the last effective rates.

H.18 52.217-08 OPTION TO EXTEND SERVICES

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The Government may require continued performance of any services within the limits and at the rates specified in the contract. These rates may be adjusted only as a result of revisions to prevailing labor rates provided by the Secretary of Labor. The option provision may be exercised more than once, but the total extension of performance hereunder shall not exceed 6 months. The Contracting Officer may exercise the option by written notice to the Contractor within 30 days of the end of the period of performance.
(End of clause)

H.19 PERFORMANCE MEASURES PLAN

The Government reserves the right to review, negotiate and incorporate the offeror's performance measures, incentive and disincentive plan as proposed. This will take place at a future date to be determined, but not later than 6 months after contract award.

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H.20 IT SECURITY REQUIREMENTS FOR UNCLASSIFIED IT RESOURCES

IT SECURITY REQUIREMENTS FOR UNCLASSIFIED INFORMATION TECHNOLOGY RESOURCES

a) This clause is applicable to all or any part of the contract that includes information technology resources or services in which the Contractor must have physical or electronic access to USPTO's sensitive information contained in unclassified systems that directly support the mission of the Agency. This includes information technology, hardware, software, and the management, operation, maintenance, programming, and system administration of computer systems, networks, and telecommunications systems.

b) Within 30 days of contract award, the Contractor shall certify in writing to the COTR that its employees, in performance of the contract, have completed:

- 1) USPTO IT Security User Awareness Training
- 2) Annual IT Security training in USPTO IT Security policies, procedures, computer ethics, and best practices (when available).

The contractor may use web-based training as available from USPTO to meet these requirements. For contracts extending beyond one year, the Contractor shall certify in writing to the COTR within the first 30 days of each contract or option year subsequent to the award year that its employees, in performance of the contract, have completed annual IT Security User Awareness training in accordance with USPTO requirements.

c) All Contractor employees are expected to comply with USPTO's IT Security policies.

d) The Contractor shall incorporate the substance of this clause in all subcontracts that meet the conditions in paragraph (a) of this clause

(End of clause)

H.21 SECURITY REQUIREMENTS FOR IT RESOURCES

CAR 1352.239-73- SECURITY REQUIREMENTS FOR INFORMATION TECHNOLOGY RESOURCES

(a) This clause is applicable to all contracts that include information technology resources or services in which the Contractor must have physical or electronic access to DOC's sensitive or classified information, which is contained in systems that directly support the mission of the Agency. For purposes of this clause the term "Sensitive" is defined by the guidance set forth in:

- (1) The DOC IT Security Program Policy and Minimum Implementation Standards (<http://www.osec.doc.gov/cio/itmhweb/itmhweb1.html>);
- (2) The Office of Management and Budget (OMB) Circular A-130, Appendix III, Security of Federal Automated Information Resources, (<http://csrc.nist.gov/secplcy/a130app3.txt>) which states that there is a "presumption that all [general support systems] contain some sensitive information."; and
- (3) The Computer Security Act of 1987 (P.L. 100-235) (<http://www.epic.org/crypto/csa/csa.html>), including the following definition of the term sensitive information "... any information, the loss, misuse, or unauthorized access, to or modification of which could adversely affect the national interest or the, conduct of federal programs, or the privacy to which individuals are entitled under section 552 a of title 5, Unites States Code (The Privacy Act), but which has not been specifically authorized under criteria established by an Executive Order or an Act of Congress to be kept secret in the interest of national defense or foreign policy."

For purposes of this clause, the term "Classified" is defined by the guidance set forth in:

- (1) The DOC IT Security Program Policy and Minimum Implementation Standards, Section 3.3.1.4 (<http://www.osec.doc.gov/cio/itmhweb/itmhweb1.html>).
- (2) The DOC Security Manual, Chapter 18 (<http://www.osec.doc.gov/osy/>).
- (3) Executive Order 12958, as amended, Classified National Security Information. Classified or national security information is information that has been

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specifically authorized to be protected from unauthorized disclosure in the interest of national defense or foreign policy under an Executive Order or Act of Congress.

Information technology resources include, but are not limited to, hardware, application software, system software, and information (data). Information technology services include, but are not limited to, the management, operation (including input, processing, transmission, and output), maintenance, programming, and system administration of computer systems, networks, and telecommunications systems. The Contractor shall be responsible for implementing sufficient Information Technology security, to reasonably prevent the compromise of DOC IT resources for all of the contractor's systems that are interconnected with a DOC network or DOC systems that are operated by the Contractor.

(b) All Contractor personnel performing under this contract and Contractor equipment used to process or store DOC data, or to connect to DOC networks, must comply with the requirements contained in the DOC Information Technology Management Handbook (<http://www.osec.doc.gov/cio/itmhweb/itmhweb1.html>), or equivalent/more specific agency or bureau guidance as specified immediately hereafter [insert agency or bureau specific guidance, if applicable].

(c) For all Contractor-owned systems for which performance of the contract requires interconnection with a DOC network or that DOC data be stored or processed on them, the Contractor Shall:

(1) Provide, implement, and maintain an IT Security Plan. This plan shall describe the processes and procedures that will be followed to ensure appropriate security of IT resources that are developed, processed, or used under this contract. The plan shall describe those parts of the contract to which this clause applies. The Contractor's IT Security Plan shall comply with federal laws that include, but are not limited to, the Computer Security Act of 1987 (40 U.S.C. 1441 et seq.) and the Federal Information Security Management Act of 2002, Pub. L. No. 107-347, 116 Stat. 2899, 2946-2961 (2002); Pub. L. No. 107-296, 116 Stat. 2135, 2259-2273 (2002). 38 WEEKLY COMP. PRES. DOC. 51, 2174 (Dec. 23, 2002) (providing statement by President George W. Bush regarding Federal Information Security Management Act of 2002). The plan shall meet IT security requirements in accordance with Federal and DOC policies and procedures that include, but are not limited to:

(a) OMB Circular A-130, Management of Federal Information Resources, Appendix III, Security of Federal Automated Information Resources

(<http://csrc.nist.gov/secplcy/a130app3.txt>);

(b) National Institute of Standards and Technology Special Publication 800-18, Guide for Developing Security Plans for Information Technology Systems (<http://csrc.nist.gov/publications/nistpubs/800-18/Planguide.PDF>); and

(c) DOC Procedures and Guidelines in the Information Technology Management Handbook (<http://www.osec.doc.gov/cio/itmhweb/itmhweb1.html>); .

(d) National Industrial Security Program Operating Manual (NISPOM) for classified systems (<http://www.dss.mil/isec/nispom.htm>); and

(e) [Insert agency or bureau specific guidance].

(2) Within 14 days after contract award, the contractor shall submit for DOC approval a System Certification and Accreditation package, including the IT Security Plan and a system certification test plan, as outlined in DOC IT Security Program Policy, Sections 3.4 and 3.5 (<http://home.osec.doc.gov/DOC-IT-Security-Program-Policy.htm>). The Certification and Accreditation Package must be consistent with and provide further detail for the security approach contained in the offeror's proposal or sealed bid that resulted in the award of this contract and in compliance with the requirements stated in this clause. The Certification and Accreditation Package, as approved by the Contracting Officer, in consultation with the DOC IT Security Manager, or Agency/Bureau IT Security Manager/Officer, shall be incorporated as part of the contract. DOC will use the incorporated IT Security Plan as the basis for certification and accreditation of the contractor system that will process DOC data or connect to DOC networks. Failure to submit and receive approval of the Certification and Accreditation Package, as outlined in DOC IT Security Program Policy, Sections 3.4 and 3.5 (<http://home.osec.doc.gov/DOC-IT-Security-Program-Policy.htm>) may result in termination of the contract.

(d) The Contractor shall incorporate this clause in all subcontracts that meet the conditions in paragraph (a) of this clause.

H.22 SECURITY PROCESSING REQUIREMENT FOR CONTRACTORS/SUBCONTRACTORS

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CAR 1352.239-74 SECURITY PROCESSING REQUIREMENTS FOR CONTRACTORS/SUBCONTRACTOR PERSONNEL FOR ACCESSING USPTO AUTOMATED INFORMATION SYSTEMS

(a) Contractor personnel requiring any access to AISs operated by the Contractor for USPTO or interconnected to a USPTO network to perform contract services shall be screened at an appropriate level in accordance with Commerce Acquisition Manual 1337.70, Security Processing Requirements for Service Contracts. USPTO shall provide screening using standard personnel screening forms, which the Contractor shall submit to the USPTO Contracting Officer's Technical Representative (COTR) based on the following guidance:

- 1) Contract personnel performing work designated Contract High Risk and personnel performing work designated Contract Moderate Risk in the information technology (IT) occupations and those with "global access" to an automated information AIS require a favorable pre-employment check before the start of work on the contract, regardless of the expected duration of the contract. After a favorable pre-employment check has been obtained, the Background Investigation (BI) for Contract High Risk and the Minimum Background Investigation (MBI) for Contract IT Moderate Risk positions must be initiated within three working days of the start of work.
- 2) Contract personnel performing work designated Contract Moderate Risk who are not performing IT-related contract work do not require a favorable pre-employment check prior to their employment; however, the Minimum Background Investigation (MBI) must be initiated within three working days of the subject's start of work on the contract, regardless of the expected duration of the contract.
- 3) Contract personnel performing work designated Contract Low Risk will require a National Agency Check and Inquiries (NACI) upon the subject's start of work on the contract if the expected duration of the contract exceeds 365 calendar days. The NACI must be initiated within three working days of the subject's start of work on the contract.
- 4) Contract personnel performing work designated Contract Low Risk will require a Special Agreement Check (SAC) upon the subject's start of work on the contract if the expected duration of the contract (including options) exceeds 180 calendar days but is less than 365 calendar days. The SAC must be initiated within three working days of the subject's start of work on the contract.
- 5) Contract personnel performing work on contracts requiring access to classified information must undergo investigative processing according to the Department of Defense National Industrial Security Program Operating Manual (NISPOM), (<http://www.dss.mil/isec/nispom.htm>) and be granted eligibility for access to classified information prior to beginning work on the contract.

The security forms may be obtained from USPTO Office of Security. At the option of the government, interim access to USPTO AISs may be granted pending favorable completion of a pre-employment check. Final access may be granted only on completion of an appropriate investigation based upon the risk level assigned to the contract.

(b) Within 5 days of contract award, the Contractor shall certify in writing to the COTR that its employees, in performance of the contract, have completed annual IT security awareness training in USPTO IT Security policies, procedures, computer ethics, and best practices, in accordance with the USPTO Training Policy. The COTR will inform the Contractor of any other available USPTO training resources.

(c) Within 5 days of contract award, the Contractor shall provide the COTR with signed Nondisclosure Agreements as specified in Commerce Acquisition Regulation (CAR), 1352.209-72, Restrictions Against Disclosures.

(d) The Contractor shall afford USPTO, including the Office of Inspector General, access to the Contractor's and subcontractor's facilities, installations, operations, documentation, databases, and personnel used in performance of the contract. Access shall be provided to the extent required to carry out a program of IT inspection, investigation, and audit to safeguard against threats and hazards to the integrity, availability, and confidentiality of USPTO data or to the function of computer AISs operated on behalf of USPTO, and to preserve evidence of computer crime.

(e) The Contractor shall incorporate this clause in all subcontracts that meet the conditions in paragraph (a) of this clause.

(NOTE: Low Risk contracts whose duration is less than 180 days do not ordinarily require security processing. However, even though the contract is short in duration, based on any unusual circumstances that may exist, Special Agreement Checks (SACs) may be requested, at the discretion of the Contracting Officer's Technical Representative (COTR) and/or the USPTO Security Office.)

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SECTION I -- CONTRACT CLAUSES

I.1 52.252-02 CLAUSES INCORPORATED BY REFERENCE

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. Also, the full text of a clause may be accessed electronically at this address: <http://www.arnet.gov/>

Clause	Title	Date
52.202-01	Definitions	December 2001
52.203-03	Gratuities	April 1984
52.203-05	Covenant Against Contingent Fees	April 1984
52.203-06	Restrictions On Subcontractor Sales To The Government	July 1995
52.203-07	Anti-Kickback Procedures	July 1995
52.204-04	Printed or Copied Double-Sided on Recycled Paper.	August 2000
52.209-06	Protecting the Government's Interest When Subcontracting With Contractors Debarred, Suspended, or Proposed for Debarment	July 1995
52.215-02 Alt I	Audit and Records--Negotiation Alternate I	January 1997
52.215-08	Order of Precedence--Uniform Contract Format	October 1997
52.215-11	Price Reduction for Defective Cost or Pricing Data--Modifications	October 1997
52.215-13	Subcontractor Cost or Pricing Data--Modifications	October 1997
52.219-06	Notice Of Total Small Business Set-Aside	July 1996
52.219-08	Utilization of Small Business Concerns	October 2000
52.222-01	Notice To The Government Of Labor Disputes	February 1997
52.222-03	Convict Labor	August 1996
52.222-21	Prohibition of Segregated Facilities	February 1999
52.222-26	Equal Opportunity	April 2002
52.222-35	Affirmative Action For Disabled Veterans and Veterans of the Vietnam Era	December 2001
52.222-36	Affirmative Action For Workers with Disabilities	June 1998
52.222-37	Employment Reports On Disabled Veterans and Veterans of the Vietnam Era	December 2001
52.223-06	Drug Free Workplace	May 2001
52.223-10	Waste Reduction Program.	August 2000
52.223-14	Toxic Chemical Release Reporting	October 2000
52.225-13	Restrictions on Certain Foreign Purchases	July 2000
52.226-01	Utilization Of Indian Organizations And Indian-Owned Economic Enterprises	June 2000
52.227-01	Authorization and Consent	July 1995
52.227-14	Rights in Data--General	June 1987
52.229-03	Federal, State And Local Taxes	April 2003
52.232-01	Payments	April 1984
52.232-07	Payments Under Time-And-Materials And Labor Hour Contracts	December 2002
52.232-09	Limitation On Withdrawing Of Payment	April 1984
52.232-11	Extras	April 1984
52.232-17	Interest	June 1996
52.232-18	Availability Of Funds	April 1984
52.232-23	Assignment Of Claims	January 1986
52.232-25	Prompt Payment	February 2002
52.233-01	Disputes	July 2002

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52.233-03	Protest After Award	August 1996
52.237-02	Protection Of Government Buildings, Equipment, And Vegetation	April 1984
52.237-03	Continuity Of Services	January 1991
52.242-03	Penalties for Unallowable Costs	May 2001
52.242-13	Bankruptcy	July 1995
52.243-03	Changes--Time-And-Material Or Labor-Hours	September 2000
52.245-05	Government Property (Cost-Reimbursement Time-And-Materials, Or Labor Hour Contracts)	January 1986
52.249-06 Alt IV	Termination (Cost Reimbursement) - Alternate IV	September 1996
52.249-14	Excusable Delays	April 1984
52.253-01	Computer Generated Forms	January 1991
52.232-33	Payment by Electronic Funds Transfer--Central Contractor Registration	October 2003

I.2 52.203-08 CANCELLATION, RESCISSION, AND RECOVERY OF FUNDS FOR ILLEGAL OR IMPROPER ACTIVITY JANUARY 1997

(a) If the Government receives information that a contractor or a person has engaged in conduct constituting a violation of subsection (a), (b), (c), or (d) of Section 27 of the Office of Federal Procurement Policy Act (41 U.S.C. 423) (the Act), as amended by section 4304 of the 1996 National Defense Authorization Act for Fiscal Year 1996 (Pub. L. 104-106), the Government may--

- (1) Cancel the solicitation, if the contract has not yet been awarded or issued; or
- (2) Rescind the contract with respect to which--

(i) The Contractor or someone acting for the Contractor has been convicted for an offense where the conduct constitutes a violation of subsection 27 (a) or (b) of the Act for the purpose of either--

- (A) Exchanging the information covered by such subsections for anything of value; or
- (B) Obtaining or giving anyone a competitive advantage in the award of a Federal agency procurement contract; or

(ii) The head of the contracting activity has determined, based upon a preponderance of the evidence, that the Contractor or someone acting for the Contractor has engaged in conduct constituting an offense punishable under subsections 27(e)(1) of the Act.

(b) If the Government rescinds the contract under paragraph (a) of this clause, the Government is entitled to recover, in addition to any penalty prescribed by law, the amount expended under the contract.

(c) The rights and remedies of the Government specified herein are not exclusive, and are in addition to any other rights and remedies provided by law, regulation, or under this contract.

I.3 52.203-10 PRICE OR FEE ADJUSTMENT FOR ILLEGAL OR IMPROPER ACTIVITY JANUARY 1997

(a) The Government, at its election, may reduce the price of a fixed-price type contract and the total cost and fee under a cost-type contract by the amount of profit or fee determined as set forth in paragraph (b) of this clause if the head of the contracting activity or designee determines that there was a violation of subsection 27 (a), (b), or (c) of the Office of Federal Procurement Policy Act, as amended (41 U.S.C. 423), as implemented in section 3.104 of the Federal Acquisition Regulation.

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(b) The price or fee reduction referred to in paragraph (a) of this clause shall be--

(1) For cost-plus-fixed-fee contracts, the amount of the fee specified in the contract at the time of award;

(2) For cost-plus-incentive-fee contracts, the target fee specified in the contract at the time of award, notwithstanding any minimum fee or "fee floor" specified in the contract;

(3) For cost-plus-award-fee contracts--

(i) The base fee established in the contract at the time of contract award;

(ii) If no base fee is specified in the contract, 30 percent of the amount of each award fee otherwise payable to the Contractor for each award fee evaluation period or at each award fee determination point.

(4) For fixed-price-incentive contracts, the Government may--

(i) Reduce the contract target price and contract target profit both by an amount equal to the initial target profit specified in the contract at the time of contract award; or

(ii) If an immediate adjustment to the contract target price and contract target profit would have a significant adverse impact on the incentive price revision relationship under the contract, or adversely affect the contract financing provisions, the Contracting Officer may defer such adjustment until establishment of the total final price of the contract. The total final price established in accordance with the incentive price revision provisions of the contract shall be reduced by an amount equal to the initial target profit specified in the contract at the time of contract award and such reduced price shall be the total final contract price.

(5) For firm-fixed-price contracts, by 10 percent of the initial contract price or a profit amount determined by the Contracting Officer from records or documents in existence prior to the date of the contract award.

(c) The Government may, at its election, reduce a prime contractor's price or fee in accordance with the procedures of paragraph (b) of this clause for violations of the Act by its subcontractors by an amount not to exceed the amount of profit or fee reflected in the subcontract at the time the subcontract was first definitively priced.

(d) In addition to the remedies in paragraphs (a) and (c) of this clause, the Government may terminate this contract for default. The rights and remedies of the Government specified herein are not exclusive, and are in addition to any other rights and remedies provided by law or under this contract.

I.4 52.203-12 LIMITATION ON PAYMENTS TO INFLUENCE CERTAIN FEDERAL TRANSACTIONS JUNE 1997

(a) Definitions.

"Agency," as used in this clause, means executive agency as defined in 2.101.

"Covered Federal action," as used in this clause, means any of the following Federal actions:

(1) The awarding of any Federal contract.

(2) The making of any Federal grant.

(3) The making of any Federal loan.

(4) The entering into of any cooperative agreement.

(5) The extension, continuation, renewal, amendment, or modification of any Federal contract, grant, loan, or cooperative agreement.

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"Indian tribe" and "tribal organization," as used in this clause, have the meaning provided in section 4 of the Indian Self-Determination and Education Assistance Act (25 U.S.C. 450B) and include Alaskan Natives.

"Influencing or attempting to influence," as used in this clause, means making, with the intent to influence, any communication to or appearance before an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with any covered Federal action.

"Local government," as used in this clause, means a unit of government in a State and, if chartered, established, or otherwise recognized by a State for the performance of a governmental duty, including a local public authority, a special district, an intrastate district, a council of governments, a sponsor group representative organization, and any other instrumentality of a local government.

"Officer or employee of an agency," as used in this clause, includes the following individuals who are employed by an agency:

- (1) An individual who is appointed to a position in the Government under title 5, United States Code, including a position under a temporary appointment.
- (2) A member of the uniformed services, as defined in subsection 101(3), title 37, United States Code.
- (3) A special Government employee, as defined in section 202, title 18, United States Code.
- (4) An individual who is a member of a Federal advisory committee, as defined by the Federal Advisory Committee Act, title 5, United States Code, appendix 2.

"Person," as used in this clause, means an individual, corporation, company, association, authority, firm, partnership, society, State, and local government, regardless of whether such entity is operated for profit, or not for profit. This term excludes an Indian tribe, tribal organization, or any other Indian organization with respect to expenditures specifically permitted by other Federal law.

"Reasonable compensation," as used in this clause, means, with respect to a regularly employed officer or employee of any person, compensation that is consistent with the normal compensation for such officer or employee for work that is not furnished to, not funded by, or not furnished in cooperation with the Federal Government.

"Reasonable payment," as used in this clause, means, with respect to professional and other technical services, a payment in an amount that is consistent with the amount normally paid for such services in the private sector.

"Recipient," as used in this clause, includes the Contractor and all subcontractors. This term excludes an Indian tribe, tribal organization, or any other Indian organization with respect to expenditures specifically permitted by other Federal law.

"Regularly employed," as used in this clause, means, with respect to an officer or employee of a person requesting or receiving a Federal contract, an officer or employee who is employed by such person for at least 130 working days within 1 year immediately preceding the date of the submission that initiates agency consideration of such person for receipt of such contract. An officer or employee who is employed by such person for less than 130 working days within 1 year immediately preceding the date of the submission that initiates agency consideration of such person shall be considered to be regularly employed as soon as he or she is employed by such person for 130 working days.

"State," as used in this clause, means a State of the United States, the District of Columbia, the Commonwealth of Puerto Rico, a territory or possession of the United States, an agency or instrumentality of a State, and multi-State, regional, or interstate entity having governmental duties and powers.

(b) Prohibitions.

- (1) Section 1352 of title 31, United States Code, among other things, prohibits a recipient of a Federal contract, grant, loan, or cooperative agreement from using appropriated funds to pay any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with any of the following covered Federal actions: the awarding of any Federal contract; the making of any Federal grant; the making of any Federal loan; the entering into of any cooperative agreement; or the modification of any Federal contract, grant, loan, or cooperative agreement.

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(2) The Act also requires Contractors to furnish a disclosure if any funds other than Federal appropriated funds (including profit or fee received under a covered Federal transaction) have been paid, or will be paid, to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with a Federal contract, grant, loan, or cooperative agreement.

(3) The prohibitions of the Act do not apply under the following conditions:

(i) Agency and legislative liaison by own employees.

(A) The prohibition on the use of appropriated funds, in subparagraph (b)(1) of this clause, does not apply in the case of a payment of reasonable compensation made to an officer or employee of a person requesting or receiving a covered Federal action if the payment is for agency and legislative liaison activities not directly related to a covered Federal action.

(B) For purposes of subdivision (b)(3)(i)(A) of this clause, providing any information specifically requested by an agency or Congress is permitted at any time.

(C) The following agency and legislative liaison activities are permitted at any time where they are not related to a specific solicitation for any covered Federal action:

(1) Discussing with an agency the qualities and characteristics (including individual demonstrations) of the person's products or services, conditions or terms of sale, and service capabilities.

(2) Technical discussions and other activities regarding the application or adaptation of the person's products or services for an agency's use.

(D) The following agency and legislative liaison activities are permitted where they are prior to formal solicitation of any covered Federal action--

(1) Providing any information not specifically requested but necessary for an agency to make an informed decision about initiation of a covered Federal action;

(2) Technical discussions regarding the preparation of an unsolicited proposal prior to its official submission; and

(3) Capability presentations by persons seeking awards from an agency pursuant to the provisions of the Small Business Act, as amended by Pub. L. 95-507, and subsequent amendments.

(E) Only those services expressly authorized by subdivision (b)(3)(i)(A) of this clause are permitted under this clause.

(ii) Professional and technical services.

(A) The prohibition on the use of appropriated funds, in subparagraph (b)(1) of this clause, does not apply in the case of--

(1) A payment of reasonable compensation made to an officer or employee of a person requesting or receiving a covered Federal action or an extension, continuation, renewal, amendment, or modification of a covered Federal action, if payment is for professional or technical services rendered directly in the preparation, submission, or negotiation of any bid, proposal, or application for that Federal action or for meeting requirements imposed by or pursuant to law as a condition for receiving that Federal action.

(2) Any reasonable payment to a person, other than an officer or employee of a person requesting or receiving a covered Federal action or an extension, continuation, renewal, amendment, or modification of a covered Federal action if the payment is for professional or technical services rendered directly in the preparation, submission, or negotiation of any bid, proposal, or application for that Federal action or for meeting requirements imposed by or pursuant to law as a condition for receiving that Federal action. Persons other than officers or employees of a person requesting or receiving a covered Federal action include consultants and trade associations.

(B) For purposes of subdivision (b)(3)(ii)(A) of this clause, "professional and technical services" shall be limited to advice and analysis directly applying any professional or technical discipline. For example, drafting of a legal document accompanying a bid or proposal by a lawyer is allowable. Similarly, technical advice provided by an engineer on the performance or operational capability of

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a piece of equipment rendered directly in the negotiation of a contract is allowable. However, communications with the intent to influence made by a professional (such as a licensed lawyer) or a technical person (such as a licensed accountant) are not allowable under this section unless they provide advice and analysis directly applying their professional or technical expertise and unless the advice or analysis is rendered directly and solely in the preparation, submission or negotiation of a covered Federal action. Thus, for example, communications with the intent to influence made by a lawyer that do not provide legal advice or analysis directly and solely related to the legal aspects of his or her client's proposal, but generally advocate one proposal over another are not allowable under this section because the lawyer is not providing professional legal services. Similarly, communications with the intent to influence made by an engineer providing an engineering analysis prior to the preparation or submission of a bid or proposal are not allowable under this section since the engineer is providing technical services but not directly in the preparation, submission or negotiation of a covered Federal action.

(C) Requirements imposed by or pursuant to law as a condition for receiving a covered Federal award include those required by law or regulation and any other requirements in the actual award documents.

(D) Only those services expressly authorized by subdivisions (b)(3)(ii)(A)(1) and (2) of this clause are permitted under this clause.

(E) The reporting requirements of FAR 3.803(a) shall not apply with respect to payments of reasonable compensation made to regularly employed officers or employees of a person.

(c) Disclosure.

(1) The Contractor who requests or receives from an agency a Federal contract shall file with that agency a disclosure form, OMB standard form LLL, Disclosure of Lobbying Activities, if such person has made or has agreed to make any payment using nonappropriated funds (to include profits from any covered Federal action), which would be prohibited under subparagraph (b)(1) of this clause, if paid for with appropriated funds.

(2) The Contractor shall file a disclosure form at the end of each calendar quarter in which there occurs any event that materially affects the accuracy of the information contained in any disclosure form previously filed by such person under subparagraph (c)(1) of this clause. An event that materially affects the accuracy of the information reported includes--

(i) A cumulative increase of \$25,000 or more in the amount paid or expected to be paid for influencing or attempting to influence a covered Federal action; or

(ii) A change in the person(s) or individual(s) influencing or attempting to influence a covered Federal action; or

(iii) A change in the officer(s), employee(s), or Member(s) contacted to influence or attempt to influence a covered Federal action.

(3) The Contractor shall require the submittal of a certification, and if required, a disclosure form by any person who requests or receives any subcontract exceeding \$100,000 under the Federal contract.

(4) All subcontractor disclosure forms (but not certifications) shall be forwarded from tier to tier until received by the prime Contractor. The prime Contractor shall submit all disclosures to the Contracting Officer at the end of the calendar quarter in which the disclosure form is submitted by the subcontractor. Each subcontractor certification shall be retained in the subcontract file of the awarding Contractor.

(d) Agreement. The Contractor agrees not to make any payment prohibited by this clause.

(e) Penalties.

(1) Any person who makes an expenditure prohibited under paragraph (a) of this clause or who fails to file or amend the disclosure form to be filed or amended by paragraph (b) of this clause shall be subject to civil penalties as provided for by 31 U.S.C. 1352. An imposition of a civil penalty does not prevent the Government from seeking any other remedy that may be applicable.

(2) Contractors may rely without liability on the representation made by their subcontractors in the certification and disclosure form.

(f) Cost allowability. Nothing in this clause makes allowable or reasonable any costs which would otherwise be unallowable or unreasonable. Conversely, costs made specifically unallowable by the requirements in this clause will not be made allowable under any other provision.

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I.5 52.219-14 LIMITATIONS ON SUBCONTRACTING

DECEMBER 1996

- (a) This clause does not apply to the unrestricted portion of a partial set-aside.
- (b) By submission of an offer and execution of a contract, the Offeror/Contractor agrees that in performance of the contract in the case of a contract for--
- (1) Services (except construction). At least 50 percent of the cost of contract performance incurred for personnel shall be expended for employees of the concern.
- (2) Supplies (other than procurement from a nonmanufacturer of such supplies). The concern shall perform work for at least 50 percent of the cost of manufacturing the supplies, not including the cost of materials.
- (3) General construction. The concern will perform at least 15 percent of the cost of the contract, not including the cost of materials, with its own employees.
- (4) Construction by special trade contractors. The concern will perform at least 25 percent of the cost of the contract, not including the cost of materials, with its own employees.

I.6 52.239-01 PRIVACY OR SECURITY SAFEGUARDS

AUGUST 1996

- (a) The Contractor shall not publish or disclose in any manner, without the Contracting Officer's written consent, the details of any safeguards either designed or developed by the Contractor under this contract or otherwise provided by the Government.-
- (b) To the extent required to carry out a program of inspection to safeguard against threats and hazards to the security, integrity, and confidentiality of Government data, the Contractor shall afford the Government access to the Contractor's facilities, installations, technical capabilities, operations, documentation, records, and databases.-
- (c) If new or unanticipated threats or hazards are discovered by either the Government or the Contractor, or if existing safeguards have ceased to function, the discoverer shall immediately bring the situation to the attention of the other party.

I.7 52.244-06 SUBCONTRACTS FOR COMMERCIAL ITEMS

APRIL 2003

- (a) Definitions. As used in this clause-

"Commercial item" has the meaning contained in the clause at 52.202-1, Definitions.

"Subcontract" includes a transfer of commercial items between divisions, subsidiaries, or affiliates of the Contractor or subcontractor at any tier.

- (b) To the maximum extent practicable, the Contractor shall incorporate, and require its subcontractors at all tiers to incorporate, commercial items or nondevelopmental items as components of items to be supplied under this contract.

- (c)(1) The Contractor shall insert the following clauses in subcontracts for commercial items:

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(i) 52.219-8, Utilization of Small Business Concerns (OCT 2000) (15 U.S.C. 637(d)(2) and (3)), in all subcontracts that offer further subcontracting opportunities. If the subcontract (except subcontracts to small business concerns) exceeds \$500,000 (\$1,000,000 for construction of any public facility), the subcontractor must include 52.219-8 in lower tier subcontracts that offer subcontracting opportunities.

(ii) 52.222-26, Equal Opportunity (APR 2002) (E.O. 11246).

(iii) 52.222-35, Equal Opportunity for Special Disabled Veterans, Veterans of the Vietnam Era, and Other Eligible Veterans (DEC 2001) (38 U.S.C. 4212(a)).

(iv) 52.222-36, Affirmative Action for Workers with Disabilities (JUN 1998) (29 U.S.C. 793).

(v) 52.247-64, Preference for Privately Owned U.S.-Flag Commercial Vessels (APR 2003) (46 U.S.C. Appx 1241 and 10 U.S.C. 2631) (flow down required in accordance with paragraph (d) of FAR clause 52.247-64).

(2) While not required, the Contractor may flow down to subcontracts for commercial items a minimal number of additional clauses necessary to satisfy its contractual obligations.

(d) The Contractor shall include the terms of this clause, including this paragraph (d), in subcontracts awarded under this contract.

(End of clause)

I.8 52.252-02 CLAUSES INCORPORATED BY REFERENCE FEBRUARY 1998

This contract incorporates one or more clauses by reference, with the same force and effect as if they were given in full text. Upon request, the Contracting Officer will make their full text available. Also, the full text of a clause may be accessed electronically at this/these address(es): www.arnet.gov

I.9 52.252-06 AUTHORIZED DEVIATIONS IN CLAUSES APRIL 1984

(a) The use in this solicitation or contract of any Federal Acquisition Regulation (48 CFR Chapter 1) clause with an authorized deviation is indicated by the addition of "(DEVIATION)" after the date of the clause.

(b) The use in this solicitation or contract of any Commerce Acquisition Regulation clause with an authorized deviation is indicated by the addition of "(DEVIATION)" after the name of the regulation.

I.10 52.204-07 CENTRAL CONTRACTOR REGISTRATION ALTERNATE I OCTOBER 2003
ALT I

a) *Definitions.* As used in this clause-
 Central Contractor Registration (CCR) database means the primary Government repository for Contractor information required for the conduct of business with the Government.
 Data Universal Numbering System (DUNS) number means the 9-digit number assigned by Dun and Bradstreet, Inc. (D&B) to identify unique business entities.
 Data Universal Numbering System +4 (DUNS+4) number means the DUNS number assigned by D&B plus a 4-character suffix that may be assigned by a business concern. (D&B has no affiliation with this 4-character suffix.) This 4-character suffix may be assigned at the discretion of the business concern to establish additional CCR records for identifying alternative Electronic Funds Transfer (EFT) accounts (see the FAR at Subpart 32.11) for the same parent concern.
 Registered in the CCR database means that-

- (1) The Contractor has entered all mandatory information, including the DUNS number or the DUNS+4 number, into the CCR database; and
- (2) The Government has validated all mandatory data fields and has marked the record "Active".
- (b)(1) The Contractor shall be registered in the CCR database by December 31, 2003. The Contractor shall maintain registration during performance and through final payment of this contract. (2) The Contractor shall enter, in the block with its name and address on the cover page of the SF 30, Amendment of solicitation/ Modification of Contract, the annotation "DUNS" or "DUNS +4" followed by the DUNS or DUNS +4 number that identifies the Contractor's name and address exactly as stated in this contract. The DUNS number will be used by the Contracting Officer to verify that the Contractor is registered in the CCR database.
- (c) If the offeror does not have a DUNS number, it should contact Dun and Bradstreet directly to obtain one.
- (1) An offeror may obtain a DUNS number-
- (i) If located within the United States, by calling Dun and Bradstreet at 1-866-705-5711 or via the Internet at [http:// www.dnb.com](http://www.dnb.com); or
- (ii) If located outside the United States, by contacting the local Dun and Bradstreet
- (2) The offeror should be prepared to provide the following information:
- (i) Company legal business.
- (ii) Tradestyle, doing business, or other name by which your entity is commonly recognized.
- (iii) Company Physical Street Address, City, State, and Zip Code.
- (iv) Company Mailing Address, City, State and Zip Code (if separate from physical).
- (v) Company Telephone Number.
- (vi) Date the company was started.
- (vii) Number of employees at your location.
- (viii) Chief executive officer/key manager.
- (ix) Line of business (industry).
- (x) Company Headquarters name and address (reporting relationship within your entity).
- (d) If the Offeror does not become registered in the CCR database in the time prescribed by the Contracting Officer, the Contracting Officer will proceed to award to the next otherwise successful registered offeror.
- (e) Processing time, which normally takes 48 hours, should be taken into consideration when registering. Offerors who are not registered should consider applying for registration immediately upon receipt of this solicitation.
- (f) The Contractor is responsible for the accuracy and completeness of the data within the CCR database, and for any liability resulting from the Government's reliance on inaccurate or incomplete data. To remain registered in the CCR database after the initial registration, the Contractor is required to review and update on an annual basis from the date of initial registration or subsequent updates its information in the CCR database to ensure it is current, accurate and complete. Updating information in the CCR does not alter the terms and conditions of this contract and is not a substitute for a properly executed contractual document.
- (g)(1)(i) If a Contractor has legally changed its business name, "doing business as" name, or division name (whichever is shown on the contract), or has transferred the assets used in performing the contract, but has not completed the necessary requirements regarding novation and change-of-name agreements in Subpart 42.12, the Contractor shall provide the responsible Contracting Officer a minimum of one business day's written notification of its intention to (A) change the name in the CCR database; (B) comply with the requirements of Subpart 42.12 of the FAR; and (C) agree in writing to the timeline and procedures specified by the responsible Contracting Officer. The Contractor must provide with the notification sufficient documentation to support the legally changed name.
- (ii) If the Contractor fails to comply with the requirements of paragraph (g)(1)(i) of this clause, or fails to perform the agreement at paragraph (g)(1)(i)(C) of this clause, and, in the absence of a properly executed novation or change-of-name agreement, the CCR information that shows the Contractor to be other than the Contractor indicated in the contract will be considered to be incorrect information within the meaning of the "Suspension of Payment" paragraph of the electronic funds transfer (EFT) clause of this contract.
- (2) The Contractor shall not change the name or address for EFT payments or manual payments, as appropriate, in the CCR record to reflect an assignee for the purpose of assignment of claims (see FAR Subpart 32.8, Assignment of Claims). Assignees shall be separately registered in the CCR database. Information provided to the Contractor's CCR record that indicates payments, including those made by EFT, to an ultimate recipient other than that Contractor will be considered to be incorrect information within the meaning of the "Suspension of payment" paragraph of the EFT clause of this contract.
- (h) Offerors and Contractors may obtain information on registration and annual confirmation requirements via the internet at <http://www.ccr.gov> or by calling 1-888-227-2423, or 269-961-5757.

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SECTION J -- LIST OF DOCUMENTS, EXHIBITS AND OTHER ATTACHMENTS

J.1 ATTACHMENT LISTING

Attachment 1 - Hardware Listing

AMENDMENT OF SOLICITATION/ MODIFICATION OF CONTRACT

1. CONTRACT ID CODE

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2. AMENDMENT/MODIFICATION NO. 0004	3. EFFECTIVE DATE 02/19/2004	4. REQUISITION/PURCHASE REQ. NO. PROC0100232	5. PROJECT NO. (If applicable)
6. ISSUED BY No Invoice Information U.S. Patent and Trademark Office, 2011 Crystal Drive, Suite 810 Arlington, VA 22202		CODE 17	7. ADMINISTERED BY (If other than Item 6) CODE

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and Zip Code) Trawick and Associates 6900 Wisconsin Avenue, Suite 400 Bethesda, MD 20815	9A. AMENDMENT OF SOLICITATION NO.
	9B. DATED (SEE ITEM 11)
	(X) 10A. MODIFICATION OF CONTRACT/ORDER NO. 50PAPT201025
	(X) 10B. DATED (SEE ITEM 13) 07/03/2002
CODE *	FACILITY CODE

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers is extended, is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:
 (a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

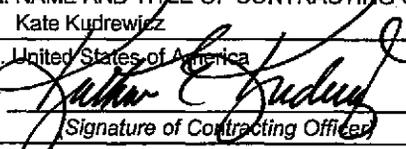
12. ACCOUNTING AND APPROPRIATION DATA (If required)

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
<input type="checkbox"/>	
<input type="checkbox"/>	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
<input type="checkbox"/>	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
<input checked="" type="checkbox"/>	D. OTHER (Specify type of modification and authority) The Option Clause of the Contract.

E. IMPORTANT: Contractor is not, is required to sign this document and return _____ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)
 This modification MO04, to Contract No. 50-PAPT-2-01025 is being issued to exercise Option Period 4. See attached for details.

15A. NAME AND TITLE OF SIGNER (Type or print)		16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) Kate Kudrewicz	
15B. CONTRACTOR/OFFEROR (Signature of person authorized to sign)	15C. DATE SIGNED	16B. United States of America BY  (Signature of Contracting Officer)	16C. DATE SIGNED 02/19/2004

Line Item Summary	Document Number 50PAPT201025/0004	Title FMEUS2 MO04 Option Exercise	Page 2 of 3
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Line Item Number	Description	Delivery Date (Start date to End date)	Quantity	Unit of Issue	Unit Price	Total Cost
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This contract is for Facilities Management and End-User Support Services (FMEUS2). This is modification MO04 to Contract No. 50-PAPT-2-01025. This modification exercises option period 2, extending the period of performance through June 30, 2005.

No Changed Line Item Fields

Previous Total: \$0.00
Modification Total: \$0.00
Grand Total: \$0.00

Procurement P.O.C. Kate Kudrewicz, (703) 305-8324. Program Office P.O.C. Tom King, (703) 305-8999. Contractor P.O.C. Carol Trawick, (301) 654-6088. Fax (301) 656-2251.

The purpose of this modification to contract number 50-PAPT-2-01025 is to, exercise Option Period 2. Accordingly, said contract is hereby modified as follows:

1. In accordance with clause H.11, entitled, Option to Extend the Term of the Contract, and the letter dated February 6, 2004, providing preliminary notice of the Government's intention to exercise the second option period of the contract, the Government hereby exercises that option. The effective date of option period 2 will be from July 1, 2004 through June 30, 2005 thus extending the period of performance of the contract.

Except as provided herein, all other terms and conditions of the contract remain unchanged and in full force and effect.

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

1. CONTRACT ID CODE

Page
1 of 6

2. AMENDMENT/MODIFICATION NO. 0005	3. EFFECTIVE DATE 05/01/2004	4. REQUISITION/PURCHASE REQ. NO. PROC0100232	5. PROJECT NO. (If applicable)
6. ISSUED BY No Invoice Information U.S. Patent and Trademark Office, 2011 Crystal Drive, Suite 810 Arlington, VA 22202		CODE 17	7. ADMINISTERED BY (If other than Item 6) CODE

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and Zip Code) Trawick and Associates 6900 Wisconsin Avenue, Suite 400 Bethesda, MD 20815	9A. AMENDMENT OF SOLICITATION NO.
	9B. DATED (SEE ITEM 11)
	(X) 10A. MODIFICATION OF CONTRACT/ORDER NO. 50PAPT201025
	(X) 10B. DATED (SEE ITEM 13) 07/03/2002

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers is extended, is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:
 (a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (If required)

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
<input checked="" type="checkbox"/>	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
<input type="checkbox"/>	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
<input type="checkbox"/>	D. OTHER (Specify type of modification and authority)

E. IMPORTANT: Contractor is not, is required to sign this document and return _____ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)
 The purpose of this modification, MO05, to Contract 50-PAPT-2-01025, is to change the designation of primary COTR responsibilities. Effective May 1, 2004, Mr. Jack Bowles will assume the primary responsibilities of the COTR for this contract.

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)	16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) Chris Mikita
15B. CONTRACTOR/OFFEROR	15C. DATE SIGNED
(Signature of person authorized to sign)	16B. United States of America BY  (Signature of Contracting Officer)
	16C. DATE SIGNED 5/10/04

Line Item Summary	Document Number 50PAPT20102-0005	Title FMEUS2 MO05 COTR Change	Page 2 of 6
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Line Item Number	Description	Delivery Date (Start date to End date)	Quantity	Unit of Issue	Unit Price	Total Cost
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This contract is for Facilities Management and End-User Support Services (FMEUS2). This is modification MO05 to Contract No. 50-PAPT-2-01025. This modification changes the designation of primary COTR responsibilities.

No Changed Line Item Fields

Previous Total: \$0.00
Modification Total: \$0.00
Grand Total: \$0.00

Procurement P.O.C. Kate Kudrewicz, (703) 305-8324. Program Office P.O.C. Jack Bowles, (703) 305-8823. Contractor P.O.C. Carol Trawick, (301) 654-6088. Fax (301) 656-2251.

Award/Contract Modification	Document No. 50PAPT201025/0005	Document Title FMEUS2 MO05 COTR Change	Page 3 of 6
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G.1 Contract Administration	5

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SECTION A -- SOLICITATION/CONTRACT FORM

A.1 SUMMARY OF CHANGES

The free form item 'Contract Administration has been edited.

Award/Contract Modification	Document No. 50PAPT201025/0005	Document Title FMEUS2 MO05 COTR Change	Page 5 of 6
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SECTION G -- CONTRACT ADMINISTRATION DATA

G.1 CONTRACT ADMINISTRATION

Notwithstanding the Contractor's responsibility for total management during the performance of this contract, the administration of the contract will require maximum coordination between the Government and the Contractor. The following individuals will be the Government point of contact during the performance of the contract.

A. Contracting Officer's Technical Representative (COTR)

(1) The COTR will be designated on authority of the CO to monitor all technical aspects and assist in administering the contract. The types of actions within the purview of the COTR's authority are to assure that the Contractor performs the technical requirements of the contract; to perform or cause to be performed inspection necessary in connection with Contract concerning the aspects of the contract within his/her purview; to issue written interpretations of technical requirements of the Government drawings, designs, and specifications; to monitor the Contractor's performance under the contract and notify the Contractor and CO of any deficiencies observed; and to coordinate Government-Furnished Property availability and provide for site entry of Contractor personnel, if required. A letter of designation will be issued to the COTR with a copy supplied to the Contractor, stating the responsibilities and limitations of the COTR. This letter will clarify to all parties to this contract the responsibilities of the COTR

(2) Jack Bowles, is hereby designated as the COTR. The COTR may be changed at any time by the Government without prior notice to the Contractor but notification of the change, including the name and address of the successor COTR, will be promptly provided to the Contractor by the CO in writing.

NAME: Jack Bowles
ADDRESS: U.S. Patent and Trademark Office
Office of Chief Information Officer
21211 Crystal Drive
Crystal Park Two, Suite 1002
Arlington, VA 22202
PHONE: (703) 305-8823

(3) The responsibilities and limitations of the COTR are as follows:

(a) The COTR is responsible for the technical aspects of the project and technical liaison with the Contractor. The COTR is also responsible for the final inspection and acceptance of all reports, and such other responsibilities as may be specified in the contract.

(b) The COTR is not authorized to make any commitments or otherwise obligate the Government or authorize any changes which affect the scope of work, contract price, or other mutually agreed upon terms or provisions of the contract. Any Contractor request for changes shall be referred to the Contracting Officer (CO) directly or through the COTR. No such changes shall be made without the expressed prior authorization of the CO. The COTR may designate assistant COTR(s) to act for him/her by naming such an assistant in writing and transmitting a copy of such designation through the CO to the Contractor.

B. Task Manager(s)

All Task Manager(s) will be designated on authority of the CO to monitor all day-to-day aspects of task orders in conjunction with the COTR. The Task Managers will have the equivalent authority as the COTR under the contract with regard to the specific task assigned. The Task Manager(s) will be designated in all task orders.

C. Contracting Officer (CO)

All contract administration will be effected by the CO. Communications pertaining to contract administration matters will be addressed to the CO. No changes in or deviation from the scope of work shall be effected without a Supplemental Agreement executed by the CO authorizing such changes.

Award/Contract Modification	Document No. 50PAPT201025/0005	Document Title FMEUS2 MO05 COTR Change	Page 6 of 6
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AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

1. CONTRACT ID CODE

Page
1 of **3**

2. AMENDMENT/MODIFICATION NO. 0006	3. EFFECTIVE DATE 03/02/2005	4. REQUISITION/PURCHASE REQ. NO. PROC0100232	5. PROJECT NO. (If applicable)
6. ISSUED BY No Invoice Information U.S. Patent and Trademark Office, 2011 Crystal Drive, Suite 810 Arlington, VA 22202		CODE 17	7. ADMINISTERED BY (If other than Item 6) CODE

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and Zip Code) Trawick and Associates 6900 Wisconsin Avenue, Suite 400 Bethesda, MD 20815	9A. AMENDMENT OF SOLICITATION NO.
	9B. DATED (SEE ITEM 11)
	(X) 10A. MODIFICATION OF CONTRACT/ORDER NO. 50PAPT201025
	(X) 10B. DATED (SEE ITEM 13) 07/03/2002
CODE *	FACILITY CODE

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers is extended, is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:
 (a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (If required)

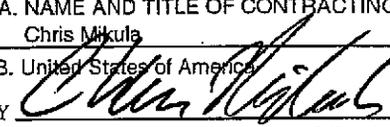
13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
<input type="checkbox"/>	
<input type="checkbox"/>	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
<input type="checkbox"/>	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
<input checked="" type="checkbox"/>	D. OTHER (Specify type of modification and authority) The Option Clause of the Contract.

E. IMPORTANT: Contractor is not, is required to sign this document and return _____ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings; including solicitation/contract subject matter where feasible.)
 The purpose of this modification, MO06, to contract 50-PAPT-2-01025, is to exercise Option Period Three (3). See attached for details.

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)	16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) Chris Mikula		
15B. CONTRACTOR/OFFEROR	15C. DATE SIGNED	16B. United States of America BY  (Signature of Contracting Officer)	16C. DATE SIGNED 3/2/05
(Signature of person authorized to sign)			

Line Item Summary	Document Number 50PAPT201025/0006	Title FMEUS2 Ex. Opt. 3 MO06	Page 2 of 3
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Line Item Number	Description	Delivery Date (Start date to End date)	Quantity	Unit of Issue	Unit Price	Total Cost
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This contract is for Facilities Management and End-User Support Services (FMEUS2). This is modification MO06 to Contract No. 50-PAPT-2-01025. This modification exercises Option Period Three (3) & extends the period of performance through June 30, 2006.

No Changed Line Item Fields

Previous Total: \$0.00
Modification Total: \$0.00
Grand Total: \$0.00

Procurement P.O.C. Chris Mikula, (571) 272-6559. Program Office P.O.C. Jack Bowles, (703) 305-8823. Contractor P.O.C. Carol Trawick, (301) 654-6088. Fax (301) 656-2251.

The purpose of this modification to contract number 50-PAPT-2-01025 is to, exercise Option Period Three. Accordingly, said contract is hereby modified as follows:

1. In accordance with H.11, entitled, Option to Extend the Term of the Contract, and the letter dated February 24, 2005, providing preliminary notice of the Government's intention to exercise the third option period of the contract, the Government hereby exercises the option. The effective date of Option Period Three will be from July 1, 2005 through June 30, 2006 thus extending the period of performance of the contract.

Except as provided herein, all other terms and conditions of the contract remain the same and unchanged and in full force and effect.

2. AMENDMENT/MODIFICATION NO. 0007	3. EFFECTIVE DATE 07/21/2005	4. REQUISITION/PURCHASE REQ. NO. PROC0100232	5. PROJECT NO. (If applicable)
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6. ISSUED BY No Invoice Information U.S. Patent and Trademark Office, P.O. Box 1450 - Mall Stop 6, 600 Dulany Street, MDE, 7th Floor Alexandria, VA 22313-1450	CODE 000PA	7. ADMINISTERED BY (If other than Item 6)	CODE
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8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and Zip Code) Trawick and Associates 6900 Wisconsin Avenue, Suite 400 Bethesda, MD 20815	9A. AMENDMENT OF SOLICITATION NO. 9B. DATED (SEE ITEM 11) (X) 10A. MODIFICATION OF CONTRACT/ORDER NO. 50PAPT201025 (X) 10B. DATED (SEE ITEM 13) 07/03/2002
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11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers is extended, is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:
 (a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. **FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER.** If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (If required)

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
<input type="checkbox"/>	
<input type="checkbox"/>	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
<input type="checkbox"/>	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
<input checked="" type="checkbox"/>	D. OTHER (Specify type of modification and authority) The Notification of Changes Clause of the Contract - FAR Clause 52.243-3

E. IMPORTANT: Contractor is not, is required to sign this document and return _____ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)
 The purpose of this modification, 0007, to Contract 50PAPT201025, is to incorporate the "Performance Evaluation Plan for Award Fee". See attached for details.

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print) <i>Cara Trawick CEO</i>	16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) Page Etzel
15B. CONTRACTOR/OFFEROR <i>(Signature)</i>	16B. United States of America <i>(Signature)</i>
15C. DATE SIGNED 7/21/05	16C. DATE SIGNED 7/21/05

Line Item Summary	Document Number 50PAPT201025/0007	Title FMEUS2 Opt. 3 MO07	Page 2 of 2
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Line Item Number	Description	Delivery Date (Start date to End date)	Quantity	Unit of Issue	Unit Price	Total Cost
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This contract is for Facilities Management and End-User Support Services (FMEUS2). This is modification MO07 to Contract No. 50-PAPT-2-01025. This modification incorporates the "Performance Evaluation Plan for Award Fee".

No Changed Line Item Fields

Previous Total: \$0.00
Modification Total: \$0.00
Grand Total: \$0.00

Procurement P.O.C. Joe Troia (571) 272-8407. Program Office P.O.C. Jack Bowles, (703) 305-8823. Contractor P.O.C. Carol Trawick, (301) 654-6088. Fax (301) 656-2251.

FACILITIES MANAGEMENT AND END USER SUPPORT
CONTRACT MODIFICATION

CONTRACT NO.: 50-PAPT-2-01025

MOD NO.: 007

EFFECTIVE DATE: July 21, 2005

ISSUED BY: Director of the U.S. Patent and Trademark Office
Office of Procurement Mail Stop 6
P.O. Box 1450
Alexandria, VA 22313-1450

ISSUED TO: Trawick And Associates
6900 Wisconsin Avenue
Suite 400
Bethesda, MD 20815

The purpose of this modification, 007, to Contract 50-PAPT-2-01025, is to facilitate an administrative change, whereby incorporating a "Performance Evaluation Plan for Award Fee". Accordingly, said contract is hereby modified as follows:

1. Pursuant to the authority and in accordance with FAR 52.243-3, Notification of Changes, the Government exercises its authority to modify the contract to reflect an administrative change associated with defining the evaluation plan for award fee. The effective date of this change is July 21, 2005.

Except as provided herein, all other terms and conditions of the contract remain the same and unchanged and in full force and effect.

PERFORMANCE EVALUATION PLAN FOR THE AWARD FEE

I. Introduction

- a. Purpose. This Contract Performance Evaluation Plan serves as the basis for evaluation of the contractor's performance on the Facilities Management and End User Support (FMEUS2) Contract. The award fee is intended to motivate and incentivize the contractor to provide work products that exceed the terms and conditions (quality, schedule, and cost) as set forth in the individual task orders. There is neither a requirement nor a presumption that the fee set for a given period will become a baseline for the fee applicable to future periods.
- b. Determination. Allocation of the award fee is a unilateral determination of the Government which is not subject to the Disputes" Clause of the contract.

c. Organization and Responsibilities

- a. Fee Determination Official. The Fee Determination Official is a senior CIG management official (either the Chief Information Officer (CIO) or a duly authorized representative from the Office of the Chief Information Officer), independent from the user component, who makes the final award fee determination.

The responsibilities of the Fee Determination Official are:

- (1) To approve the Contract Performance Evaluation Plan and any changes required during contract performance
- (2) To review the recommendation of the Performance Evaluation Board and to discuss it with the Board Chairperson, and, if appropriate, others such as the COTR and the contractor
- (3) To issue and sign the award fee determination for that period, specifying the amount of award fee determined and the basis for that determination

- b. Performance Evaluation Board. The Performance Evaluation Board (PEB) is a panel of senior management officials who perform an in-depth review of all aspects of the Contractor's performance and recommend an award fee to the Fee Determination Official.

The Performance Evaluation Board shall be chaired by a senior CIO management official. The Chairman of the Performance Evaluation Board will be selected by the Chief Information Officer and will be a non-voting member of the Board. The Performance Evaluation Board shall also consist of five voting members who are appointed by the CIO. The Chairman and the five voting members will be designated separately, in writing, by the Government.

The responsibilities of the Performance Evaluation Board are:

- (1) To perform an in-depth review of the Contractor's performance based upon the Task Order Manager input, COTR input, and such additional performance information as may be obtained from the contractor and other sources
- (2) To submit a PEB Report to the Fee determination Official covering the Board's findings and recommendations for each evaluation period
- (3) To ensure that the award fee process is administered in accordance with the policy and guidelines of the Contract Performance Evaluation Plan

(4) To recommend appropriate changes in the contract performance evaluation plan for consideration and approval by the Fee Determination Official

c. Contracting Officer. The Contracting Officer shall determine the amount of the award fee pool available and shall serve as an advisor to the Performance Evaluation Board. The Contracting Officer may make a report to the Performance Evaluation Board with recommendations concerning the amount of the fee to be awarded based on the Contracting Officer's assessment of performance or audit results.

The responsibilities of the Contracting Officer are:

- (1) To determine the available award fee pool
- (2) To serve as an advisor to the Performance Evaluation Board
- (3) To prepare a report and recommendation on the award fee when there is sufficient reason for such a report
- (4) To approve the award fee letter, and then sign and provide the letter to the Contractor

d. Contracting Officer's Technical Representative (COTR). The COTR is the Government official designated to receive and assess individual Task Order Manager reports and to present performance information and an award fee recommendation to the Performance Evaluation Board.

The responsibilities of the COTR are:

- (1) To communicate on a regular basis with the Contractor and discuss the Contractor's performance
- (2) To recommend an award fee to the Performance Evaluation Board based on the COTR's narrative assessment of Task Order Manager comments, discussions with the Contracting Officer, the Contractor's technical progress reports, and meetings with the Contractor
- (3) To serve as a non-voting member of the Performance Evaluation Board and to attend all Board meetings

d. Performance Evaluation Board Executive Coordinator . The Executive Coordinator will serve as a non-voting member of the Performance Evaluation Board and will assist the COTR and the Chairperson in the execution of the award fee process.

The responsibilities of the Executive Coordinator are:

- (1) To administer the award fee evaluation process and to provide training to Task Order Managers
 - (2) To ensure that the award fee process is completed in a timely manner
 - (3) To calculate the award fee recommendation based on Task Order Manager performance evaluation reports
 - (4) To arrange board meetings and agenda and prepare official Performance Evaluation Board reports and other correspondence
- f. Task Order Manager. The Task Order Manager monitors the Contractor's performance on a daily basis and as such is the primary point for assessing Contractor performance in the award fee evaluation process.

The responsibilities of the Task Order Manager are:

- (1) To oversee the Contractor's efforts and maintain ongoing communications with their contractor counterparts;
- (2) To keep the COTR informed of contractor performance and to alert the COTR when there are potential or existing contractor performance problem
- (3) To participate in Status Review meetings by providing the contractor with feedback on performance
- (4) To maintain a log or diary of events and communications with the contractor for use in the monthly and end of period award fee evaluations

3. Award Fee Cycle

Performance under this contract will be evaluated on an annual basis (every 12 months). All task orders that have work underway during the award fee cycle shall be evaluated. The only exception is those task orders where the task order start date is one (1) month or less, prior to the end of the award fee cycle.

Each evaluation will be scheduled so that the final determination of the fee earned will be accomplished within 45 calendar days after the end of an evaluation period.

4. Award Fee Pool

The award fee pool will be determined by the maximum allowable award fee percentage and the budgeted amount of work to be performed in the task order(s) for that particular

award fee period. Therefore, the award fee pool will vary each award fee period depending upon the amount of tasking the contractor has received. Other direct costs (ODC's) will not be included in the award fee pool. The Contracting Officer shall keep the Contractor informed of the award fee pool.

Any unawarded portion of each respective award fee period pool shall not be automatically transferred to another period and shall be withdrawn from any award fee pool. However, the EDO can, if deemed appropriate, recommend to the Contracting Officer that fee (or partial fee) from one award fee period be transferred to another award fee period.

As part of the fee determination process, the Performance Evaluation Board or the Fee Determination Official may recommend that task order fee be removed or withheld from the award fee pool when contractor performance justifies the removal of fee.

5. Performance Evaluation Categories, Criteria, and Fee Allocation Weighting

The evaluation criteria established for the evaluation of award fee are as follows:

a. Objective Rating (60 percent)

The Objective Rating will be determined in accordance with the attached Performance Metrics. Each individual metric under the specific task shall be rated based upon performance over and above the minimum rating established by the Performance Metric. The rates for each metric under the task will be computed to determine the average Objective Rating. The average rating will be converted according to the following table and used to determine the potential percentage of award fee for that task order.

The following table is for use in converting the Average Objective Rating to the Potential Award Fee Percentage for each individual task:

Recommended Rating	Potential Award Fee Percentage
5	100
4	80
3	60
2	40
1	20

b. Subjective Rating (40 percent)

The following are elements that will be considered in evaluating the Contractor's Business Management performance.

- (1) Achievement/Implementation - Ability to meet the technical and performance requirements as specified within the task order or design documents; thoroughness and accuracy of completed tasks and/or work products; response to requirements of the task order or technical direction; ability to provide skillful, original or straight-forward solutions beneficial to the Government and public/user requirements; ability to resolve contract performance problems without guidance from PTO personnel
 - (2) Schedule - Ability to meet key program milestones and task order delivery dates; reaction time and appropriateness of response to changes, recovery from delays, response to emergencies and other unexpected situations
 - (3) Program Planning, Organization and Management - Assignment and utilization of contractor staff; recognition of critical problem areas; cooperation and effective working relationships with Government personnel and other contractors; planning, organizing, and managing all program elements; formulation of business and technical decisions; management actions to achieve and sustain a high level of productivity; provide management/COTR with prompt communication regarding progress, problems and other related contract performance issues
 - (4) Contract and Subcontract Management - Compliance with contract provisions; effectiveness of property and material control; effectiveness of subcontract direction, coordination and administration;
 - (5) Cost Control - contractor's reimbursed costs and projected costs remain within the cost estimate negotiated for the task order; contractor controls costs through study and use of alternative arrangements, cost avoidance programs, etc.; contractor keeps management/COTR informed of potential cost issues and possible overruns
- (5) Efficiency -- contractor assigns appropriate resources to tasks; personnel resources are made available when required and are at the right skill level to perform the task; efficient use of materials, equipment, and ODC's

6. Subjective Rating and Scoring

- a. Ratings. The following standards of performance shall be employed in determining whether and to what extent the contractor has earned or may be entitled to receive any award fee:
 - (1) Excellent (90 to 100). Performance is superior in virtually all aspects of the subcategory. The Contractor has demonstrated an overall level of performance, which exceeds the standard by a substantial margin in numerous significant tangible and intangible benefits to the Government (i.e., improved quality, responsiveness, increased timeliness, or generally enhanced effectiveness of systems and operations).
 - (2) Commendable (80 to 89). Performance of most task requirements is uniformly well above the standard and exceeds the standard in many significant areas. Although some areas may require improvements, these are minor and are more than offset by better performance in other areas. Contractor actions have resulted in tangible and intangible benefits to the Government (i.e., improved quality, responsiveness, increased timeliness, or generally enhanced effectiveness of systems and operations).
 - (3) Good (70 to 79). Performance in most aspects meets the standard, and it exceeds the standard in several significant areas. While the remainder of the effort generally meets task order requirements, areas requiring improvement are more than offset by better performance in other areas. Contractor actions have resulted in some demonstrated benefits to the Government (i.e., improved quality, responsiveness, timeliness or effectiveness).
 - (4) Fully Successful (60 to 69). Performance is generally adequate in all aspects of the subcategory, resulting in satisfactory performance. Some areas of deficiency need to be improved or corrected but contractor performance meets the technical requirements of the task order.
 - (5) Unsatisfactory (0 to 59). Performance is below standard in several areas and performance in accordance with the task order requirements fails to meet minimum requirements. Quality, responsiveness, timeliness and/or economy in many areas require attention and action. Corrective actions have not been taken or are ineffective. Overall unsatisfactory performance shall not be given award fee.

7. Determination of Award Fee

a. Task Order Manager's Performance Evaluation Report

At the end of the award fee cycle, the Task Order Manager will be required to provide an overall assessment of the contractor's performance for the entire award fee cycle. This assessment will include a written narrative of the accomplishments, proficiencies, and deficiencies regarding contractor performance as well as the rating of all tasks within the task order. Using a Task Order Performance Evaluation Report Rating Form the Task Order Manager will document the rating of all the tasks and will provide the Task Order Manager's recommended rating for the entire task order. This data will be submitted to the Award Fee Executive Coordinator for submission to the COTR and the PEB.

b. COTR's Award Fee Recommendation

The COTR shall make an independent assessment of the Contractor's performance, and shall write a narrative report that includes an independent award fee recommendation to the Performance Evaluation Board. The recommendation may be more or less than that calculated from the Task Order Manager's Performance Evaluation Reports. In making this independent assessment and recommendation, the COTR shall consider the following:

- (1) Quality and completeness of work products including reliability, ease of use, operational efficiency, latent defects
- (2) Information provided by the Contractor on monthly status reports
- (3) Comments made by Task Order Managers on their Performance Evaluation Reports
- (4) Information conveyed to the COTR as a result of status meetings with the Contractor
- (5) The COTR's overall judgment of the success of the Contractor's performance

The COTR's independent assessment and award fee recommendation shall be submitted along with the Task Order Manager's Performance Evaluation Reports to the Executive Coordinator of the Performance Evaluation Board.

c. Contracting Officer's Award Fee Recommendation

The Contracting Officer normally will not provide a written report of award fee recommendation to the Performance Evaluation Board. The Contracting Officer is a non-voting member of the Board, and will participate in discussions leading to the Board's recommendation of an award fee that is made to the Fee Determination Official. The Contracting Officer retains the right to present a formal report and award fee recommendation as circumstances warrant.

The Contracting Officer shall consider the following factors either as part of general Performance Evaluation Board discussions or as part of a formal report:

- (1) The Contracting Officer's overall judgment of the success of the Contractor's performance
- (2) An analysis of the Contractor's management of direct and indirect costs
- (3) Information provided by the Contractor
- (4) Results of audits (if any) of the Contractor's business practices

d. Performance Evaluation Board's Award Fee Recommendation

The Executive Coordinator of the Performance Evaluation Board will schedule the Performance Evaluation Board meeting after receipt and dissemination of the award fee recommendation reports from the COTR and the Contracting Officer, if one is prepared by the Contracting Officer. The Performance Evaluation Board will perform an in-depth review of the information provided and shall arrive at its recommended award fee percentage.

The award fee percentage recommended may be more or less than the percentage suggested by the recommendations received from the COTR and the Contracting Officer (if provided). The recommended percentage cannot exceed 100 percent of the available award fee pool.

The voting members shall arrive at a consensus recommendation and shall direct the Executive Coordinator to prepare a written summary that documents the recommendation. This report shall be signed by each voting member and the chairperson and shall be forwarded to the Fee Determination Official.

The members of the Performance Evaluation Board shall also review the performance categories and weighting of the categories of the Performance Evaluation Plan. They may recommend and approve changes to the plan for subsequent evaluation periods as they so determine. Any such changes shall also be reviewed and approved by the Fee Determination Official and the Contracting Officer. The Contracting Officer shall provide a copy of any changes to the Performance Evaluation Plan to the Contractor. Any revisions to the Performance Evaluation Plan shall be presented to the Contractor prior to the evaluation period in which it will be used.

e. Contractor Self-Assessment

The Contractor may, at their discretion, submit a written self-evaluation of accomplishments and performance for the subjective portion to the Performance Evaluation Board for its use during the determination of the award fee amount. The date and place of submission shall be determined by mutual consent between the Government and the Contractor, but no later than 15 days subsequent to the end of the evaluation period. This assessment should address both the strengths and weaknesses of the Contractor's performance during the evaluation period. Where deficiencies in performance are noted, the Contractor should describe the actions planned or taken to correct such deficiencies and avoid their recurrence. The Contractor will not be penalized for a realistic self-assessment. The self-assessment itself will not be the basis for the award fee determination. If prepared, the costs for preparation of the self-assessment shall not be an allowable cost under the contract.

f. Final Determination

The Fee Determination Official shall review the Performance Evaluation Board's recommendation and any supporting documentation. The Fee Determination Official may also review the COTR's assessment, the Contracting Officer's assessment, the Task Order Manager's Performance Evaluation Reports, the Contractor's Self Evaluation, and any other documentation that the Fee Determination Office may deem necessary in making the final fee determination. Once the fee determination has been made, the Fee Determination Official will send a letter to the Contracting Officer documenting the fee determination.

The Government's determination shall be final and the Contracting Officer shall unilaterally amend the contract to provide for the award fee, if any.

8. Right to Make Unilateral Changes

Any matters covered in this plan, not otherwise requiring mutual agreement under the contract, except the designated Fee Determination Official, may be changed unilaterally by the Fee Determination Official prior to the beginning of an evaluation period by timely notice to the Contractor in writing. The changes will be made without formal modification of the contract.

TRAWICK AWARD FEE CALCULATION EXAMPLE

OBJECTIVE RATING CALCULATION – (60% of total score)

Task order has 5 elements in the matrix.

Element #1 – rated 4

Element #2 – rated 5

Element #3 – rated 1

Element #4 – rated 3

Element #5 – rated 3

Total rated value 16 (4 + 5 + 1 + 3 + 3)

Average = 3.2 (16 / 5)

Percentage 64% (3.2 * .2)

Objective Rating = 38.4 (which is 64% * .6)

SUBJECTIVE RATING CALCULATION – (40% of total score)

User rates performance as a 90%

Subjective Rating = 36 (which is 90% * .4)

TOTAL OVERALL RATING IS 74.4

For this task order, Trawick would receive 74% of that task order's pool for the year.

Each task orders pool is weighted based on the actual labor cost divided by total actual labor cost.

Example: The task orders actual for the year is \$25,000 and the total actual labor cost for the year on the contract is \$178,000. This task order would have a total of 14% of the total award fee pool for that year. ($\$25,000 / \$178,000$).

If the award fee pool is 5% of actual labor, using the above example, the pool amount for that task order would be \$1,246.

Example:

$\$178,000$ (total actual) * 5% = $\$8,900$ (total pool)

$\$8,900$ (total pool) * 14% (weighted task order amount) = $\$1,246$

This task order would be eligible for a total of $\$1,246$ if it received a score of 100.

Since it received a score of 74 (see above), this task order gets $\$922.04$, which is 74% of the task order pool.

ORDER FOR SUPPLIES OR SERVICES

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

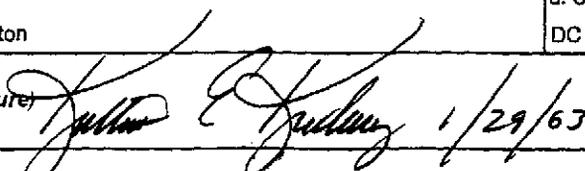
1. DATE OF ORDER 01/29/2003		2. CONTRACT NO. (If any) 50PAPT201025		6. SHIP TO: No Contacts Identified		
3. ORDER NO. 56PAPT305021		4. REQUISITION/REFERENCE NO. 192P0330059		a. NAME OF CONSIGNEE		
5. ISSUING OFFICE (Address correspondence to) Office of Procurement U.S. Patent and Trademark Office 2011 Crystal Drive, Suite 810 Arlington VA 22202				b. STREET ADDRESS		
7. TO:				c. CITY		d. STATE
				e. ZIP CODE		
NAME OF CONTRACTOR Carol Trawick				f. SHIP VIA		
COMPANY NAME Trawick and Associates				8. TYPE OF ORDER		
STREET ADDRESS 6900 Wisconsin Avenue, Suite 400				<input type="checkbox"/> a. PURCHASE REFERENCE YOUR:		<input type="checkbox"/> b. DELIVERY - Except for billing instructions on the reverse, this delivery order is subject to instructions contained on this side only of this form and is issued subject to the terms and conditions of the above-numbered contract.
CITY Bethesda		e. STATE MD	f. ZIP CODE 20815	Please furnish the following on the terms and conditions specified on both sides of this order and on the attached sheet, if any, including delivery as indicated.		
ACCOUNTING AND APPROPRIATION DATA 03 - - A - 192100 - - 2570 - - M50039 - 192510 - - - - NONCOMP - - - -				10. REQUISITIONING OFFICE OCIO/DSM/Office of Acquisition Management		

9. BUSINESS CLASSIFICATION (Check appropriate box(es))			
<input checked="" type="checkbox"/> a. SMALL	<input type="checkbox"/> b. OTHER THAN SMALL	<input type="checkbox"/> c. DISADVANTAGED	<input checked="" type="checkbox"/> d. WOMEN-OWNED
11. F.O.B. POINT Destination		14. GOVERNMENT B/L NO.	15. DELIVER TO F.O.B. POINT ON OR BEFORE (Date)
13. PLACE OF		16. DISCOUNT TERMS	
INSPECTION	b. ACCEPTANCE	10 days % 20 days % 30 days % days %	

17. SCHEDULE (See reverse for Rejections)

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
	SEE LINE ITEM DETAIL					

18. SHIPPING POINT		19. GROSS SHIPPING WEIGHT		20. INVOICE NO.		17(h) TOT. (Cont. pages)
21. MAIL INVOICE TO: (703) 305-8083						
a. NAME U.S. Patent and Trademark Office						\$177,298.37
b. STREET ADDRESS (or P.O. Box) Office of Finance, Box 17						
c. CITY Washington		d. STATE DC	e. ZIP CODE 20231			

UNITED STATES OF AMERICA BY (Signature) 			23. NAME (Typed) Kate Kudrewicz TITLE: CONTRACTING/ORDERING OFFICER			
-----------------------------------------------------------------------------------------------------------------------------	--	--	---------------------------------------------------------------------------	--	--	--

**ORDER FOR SUPPLIES OR SERVICES
SCHEDULE - CONTINUATION**

PAGE NO.
3 of 4

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER 01/29/2003	CONTRACT NO. 50PAPT201025	ORDER NO. 56PAPT305021
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ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
0001	<p><i>This is Task Order 56-PAPT-3-05021 to Contract No. 50-PAPT-2-01025. This task order is for Project Management. The period of performance is February 1, 2003 - June 30, 2003.</i></p> <p>Reference Requisition: 192P0330059</p> <p><i>Procurement P.O.C. Kate Kudrewicz, (703) 305-8324. Program Office COTR, Tom King, (703) 305-8999. Contractor P.O.C. Elaine Watson, (703) 416-4105.</i></p>					

TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 171) ⇒ \$0.00

Contract Level Funding Summary	Document Number 56PAPT30502	Title Project Management TO-01	Page 4 of 4
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2003 - - A - 192100 - - 2570 - - M50039 - 192510 - - - - NONCOMP - - - -

\$177,298.37

Reference Requisition: 192P0330059

Total Funding: \$177,298.37

PROJECT MANAGEMENT TASK
TASK ORDER TO-01

CONTRACT NO.: 50-PAPT-2-01025 ORDER NO.: 56-PAPT-3-05021
EFFECTIVE DATE: February 1, 2003
REQUISITION NO.: 192P0330059

ISSUED BY: U.S. PATENT AND TRADEMARK OFFICE
OFFICE OF PROCUREMENT
BOX 6
WASHINGTON, DC 20231

ISSUED TO: TRAWICK AND ASSOCIATES
6900 WISCONSON AVENUE
SUITE 400
BETHESDA, MD 20815

ACCOUNTING AND APPROPRIATION DATA:

2003 A 192100 2570 M50039 192510 - OBLIGATE \$177,298.37

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL (Not-to-exceed) COST FOR TO-01	[REDACTED]	[REDACTED]	N/A	\$177,298.37

This task order is issued pursuant to the authority of the Contracting Officer and Special Contract Requirements, Clause H.17. TASK ORDERS PROCEDURES of the contract.

The contractor shall provide the necessary personnel and materials to accomplish this task in accordance with the statement of work, task list, and contractor work plan as approved and attached. The Contractor or any of its subcontractors shall not exceed the ceiling amount provided above in performance of this task order, without prior written approval and an executed modification to this task order.

The effective period of performance of this delivery/task order shall be from the effective date of this order through June 30, 2003, unless otherwise mutually agreed upon and properly modified by the Contracting Officer and Trawick and Associates.

Office of the Chief Information Officer FMEUS2 Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999 Jack Bowles 305-8823	Project Management TO-01	Tom King 305-8999 Jack Bowles 305-8823

1. BACKGROUND

The objective of this task order is to provide technical project management of the United States Patent and Trademark Office (USPTO) Facilities Management/End-User Support (FMEUS2) contract. In conjunction with this task order the FMEUS2 Contractor should expect to provide support to the Office of the Chief Information Officer (OCIO) of the USPTO in the following areas:

- Project Management and Administrative Support.
- Task Order Preparation and Modification Assistance.
- Contract Financial Management.
- Technical and Management Advice.

2. STATEMENT OF WORK

1. The Contractor shall provide support to the USPTO in the area of Project Management and Administrative Support. This includes all activities associated with the Contractor's own day-to-day project management and administration responsibilities. Sample activities include project-wide planning, staffing, scheduling, coordination, integration, oversight, progress monitoring/reporting, subcontractor liaison, cost control, payment administration, productivity/quality control, continuous process improvement, meetings/briefings/presentations, and administrative support (including general correspondence; property, facility, and records management; contract management and administration; and administrative/clerical/secretarial support (e.g. typing, spreadsheets, project schedules, data base management etc.)).
2. In conjunction with the progress monitoring/ reporting requirement, the Contractor shall regularly prepare and submit to the USPTO, by the tenth (10th) day of each month, a Monthly Progress Report. This report shall detail the Contractor's progress, problems, accomplishments, and deliverables during the subject reporting period; activities planned for the next reporting period; anticipated problems; and planned vs. actual monthly as well as cumulative staff hour and cost information. The Contractor should also expect to prepare and present to the USPTO, at a time to be designated by USPTO, a Monthly Program Review Briefing. The scope of this briefing shall include key activities, planned work,

deliverable status, issues, and financial status for each FMEUS2 task order.

3. The Contractor shall provide support to the USPTO in the area of Task Order Preparation and Modification Assistance. This includes Contractor support and assistance in the preparation of new task orders (including Statement of Work preparation) as well as associated costing, modification (including the preparation of Resource Estimates), negotiation, and oversight.
4. The Contractor shall provide support to the USPTO in the area of Technical and Management Advice. This includes review and comment on key USPTO and other contractor documents as well as technical and programmatic issues as requested by the USPTO or determined necessary by the Contractor.
5. The Contractor shall notify the Contracting Officer (CO) and the Contracting Officer's Technical Representative (COTR) in writing whenever the expected costs incurred in the next sixty (60) days plus costs already incurred will exceed seventy-five percent (75%) of the total estimated cost of a task.
6. The Contractor shall prepare financial information as required by the USPTO (See deliverables).

3. GOVERNMENT FURNISHED MATERIAL

None.

4. LEVEL OF EFFORT

This option covers the period through June 30, 2003, however the Government, reserves the right to de-scope this task order at any time. The Government will notify Contractor ten (10) working days prior to termination of the task order.

5. PLACE OF PERFORMANCE

Work will be performed in Crystal City, VA and in the Contractor's leased facilities in Crystal City, Alexandria, VA and Bethesda, MD.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the COTR (electronic form preferred).

Deliverable	Due Date
Progress Reports	10 th day of each Month

File for Robbins-Gioia CAT Updates (USPTO to provide format)	15 th day of each Month
Update USPTO Actual vs. Plan Spreadsheet	3 days after receipt of invoice
Government Furnished Equipment (GFE) List	1 st day of each quarter (Oct, Jan, Apr, Jun)
Asset Discrepancy Report	Daily
Task Orders/Modifications/Resource Estimates	As Required
Cost Proposals/Invoices	As Required
Negotiations/Meetings/Briefings/Presentations	As Required
Administrative Correspondence	As Required
Review and Comment on Key Documents	As Required
Technical and Programmatic Issue Resolution	As Required
Technical Reports/Work Papers/Letters	As Required

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task order.

8. TRAWICK RESPONSE

TO-01, February 1, 2003 – June 30, 2003 – Statement of Work for the FMEUS 2 contract Project Management Task

TRAWICK proposes to perform the work outlined in the above Statement of Work with the following staffing level.

<u>Labor Category</u>	<u>Quantity</u>
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
Total	[REDACTED]

The table below summarizes the duties and responsibilities for each function.

<u>Function</u>	<u>Labor Category</u>	<u>Qty</u>	<u>Duties and Responsibilities</u>
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

A. **Resource Summary.** The following table provides a high level summary of all labor hours, labor costs, and ODC costs for the period of February 1, 2003 – June 30, 2003:

	Hours	Cost
Labor		
ODCs		
TOTAL		\$177,298.37

B. Resources by labor category. The following table provides a detailed breakdown of labor hours and costs per labor category for the period of February 1, 2003 – June 30, 2003:

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL				\$177,298.37

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

1. CONTRACT ID CODE
Page
1 of 3

2. AMENDMENT/MODIFICATION NO. 0001
3. EFFECTIVE DATE 04/04/2003
4. REQUISITION/PURCHASE REQ. NO. See Funding Detail
5. PROJECT NO: (If applicable)

6. ISSUED BY CODE 17
Office of Procurement
U.S. Patent and Trademark Office, 2011 Crystal Drive, Suite 810
Arlington, VA 22202
7. ADMINISTERED BY (If other than Item 6) CODE

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and Zip Code)
Carol Trawick
Trawick and Associates
6900 Wisconsin Avenue, Suite 400
Bethesda, MD 20815
9A. AMENDMENT OF SOLICITATION NO.
9B. DATED (SEE ITEM 11)
10A. MODIFICATION OF CONTRACT/ORDER NO. 50PAPT201025 / 56PAPT305021 (X)
10B. DATED (SEE ITEM 13) 01/29/2003 (X)
ODE FACILITY CODE

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers is extended, is not extended.
Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:
(a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (If required)
See Funding Detail

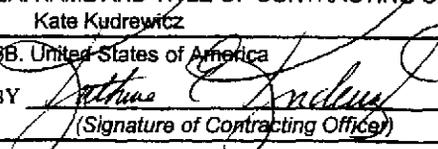
13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

- CHECK ONE**
- A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
 - B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
 - C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
 - D. OTHER (Specify type of modification and authority)
Changes Clause and Task Order Clause of the Contract

IMPORTANT: Contractor is not, is required to sign this document and return _____ copies to the issuing office.

DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)
e attached. This modification adds additional funding and extends the period of performance of this task order.

As provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

14. NAME AND TITLE OF SIGNER (Type or print)	16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) Kate Kudrewicz
15. CONTRACTOR/OFFEROR (Signature of person authorized to sign)	15C. DATE SIGNED
16B. United States of America BY  (Signature of Contracting Officer)	16C. DATE SIGNED 04/04/2003

Line Item Summary	Document Number 56PAPT305021/0001	Title Project Management TO-01/Mod 1	Page 2 of 3
--------------------------	---------------------------------------------	------------------------------------------------	-----------------------

FYs **Fund** **Budget Org** **Sub** **Object Class** **Sub** **Program** **Cost Org** **Sub** **Proj/Job No.** **Sub** **Reporting Category**
Division **Closed FYs** **Cancelled Fund**

Line Item Number	Description	Delivery Date (Start date to End date)	Quantity	Unit of Issue	Unit Price	Total Cost
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This is Task Order 56-PAPT-3-05021/0001 to Contract No. 50-PAPT-2-01025. This task order is for Project Management. The period of performance is July 1, 2003 - June 30, 2004.

No Changed Line Item Fields

Previous Total: \$177,298.37
Modification Total: \$409,482.24
Grand Total: \$586,780.61

Procurement P.O.C. Kate Kudrewicz, (703) 305-8324. Program Office COTR, Tom King, (703) 305-8999. Contractor P.O.C. Elaine Watson, (703) 416-4105.

Contract Level Funding Summary	Document Number 56PAPT305021/0001	Title Project Management TO-01/Mod 1	Page 3 of 3
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Funding Strip Code
2003 - - A - 192100 - - 2570 - - M50039 - 192510 - - - - NONCOMP - - - -

Change in Funded Amount
\$201,970.00

Reference Requisition: 192P0330109

2003 - - A - 192100 - - 2570 - - M50039 - 192510 - - - - NONCOMP - - - -

\$207,512.24

Reference Requisition: 192P0330109

PROJECT MANAGEMENT TASK
TASK ORDER TO-01 MOD MO01

CONTRACT NO.: 50-PAPT-2-01025 ORDER NO.: 56-PAPT-3-05021/0001
EFFECTIVE DATE: July 1, 2003
REQUISITION NO.: 192P0330109

ISSUED BY: U.S. PATENT AND TRADEMARK OFFICE
OFFICE OF PROCUREMENT
BOX 6
WASHINGTON, DC 20231

ISSUED TO: TRAWICK AND ASSOCIATES
6900 WISCONSON AVENUE
SUITE 400
BETHESDA, MD 20815

ACCOUNTING AND APPROPRIATION DATA:

2003 A 192100 2570 M50039 192510 - OBLIGATE \$409,482.24

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL Not-to-Exceed Cost for TO-01/Mod MO01				\$409,482.24

This task order is issued pursuant to the authority of the Contracting Officer and Special Contract Requirements, Clause H.17. TASK ORDERS PROCEDURES of the contract.

The contractor shall provide the necessary personnel and materials to accomplish this task in accordance with the statement of work, task list, and contractor work plan as approved and attached. The Contractor or any of its subcontractors shall not exceed the ceiling amount provided above in performance of this task order, without prior written approval and an executed modification to this task order.

The effective period of performance of this delivery/task order shall be from the effective date of this order through June 30, 2004, unless otherwise mutually agreed upon and properly modified by the Contracting Officer and Trawick and Associates.

Office of the Chief Information Officer FMEUS2 Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999	Project Management TO-01/MOD MO01	Tom King 305-8999 Jack Bowles 305-8823

1. BACKGROUND

The objective of this task order is to provide technical project management of the United States Patent and Trademark Office (USPTO) Facilities Management/End-User Support (FMEUS2) contract. In conjunction with this task order the FMEUS2 Contractor should expect to provide support to the Office of the Chief Information Officer (OCIO) of the USPTO in the following areas:

- Project Management and Administrative Support.
- Task Order Preparation and Modification Assistance.
- Contract Financial Management.
- Technical and Management Advice.
- Asset Management.

2. STATEMENT OF WORK

1. The Contractor shall provide support to the USPTO in the area of Project Management and Administrative Support. This includes all activities associated with the Contractor's own day-to-day project management and administration responsibilities. Sample activities include project-wide planning, staffing, scheduling, coordination, integration, oversight, progress monitoring/reporting, subcontractor liaison, cost control, payment administration, productivity/quality control, continuous process improvement, meetings/briefings/presentations, and administrative support (including general correspondence; property, facility, and records management; contract management and administration; and administrative/clerical/secretarial support (e.g. typing, spreadsheets, project schedules, data base management etc.)).
2. In conjunction with the progress monitoring/ reporting requirement, the Contractor shall regularly prepare and submit to the USPTO, by the tenth (10th) day of each month, a Monthly Progress Report. This report shall detail the Contractor's progress, problems, accomplishments, and deliverables during the subject reporting period; activities planned for the next reporting period; anticipated problems; and planned vs. actual monthly as well as cumulative staff hour and cost information. The Contractor should also expect to prepare and present to the USPTO, at a time to be designated by USPTO, a Monthly Program Review Briefing. The scope of this briefing shall include key activities, planned work, deliverable status, issues, and financial status for each FMEUS2 task order.

3. The Contractor shall provide support to the USPTO in the area of Task Order Preparation and Modification Assistance. This includes Contractor support and assistance in the preparation of new task orders (including Statement of Work preparation) as well as associated costing, modification (including the preparation of Resource Estimates), negotiation, and oversight. Work plans will be responded to within five (5) business days from the date of receipt.
4. The Contractor shall provide support to the USPTO in the area of Technical and Management Advice. This includes review and comment on key USPTO and other contractor documents as well as technical and programmatic issues as requested by the USPTO or determined necessary by the Contractor.
5. The Contractor shall notify the Contracting Officer (CO) and the Contracting Officer's Technical Representative (COTR) in writing whenever the expected costs incurred in the next sixty (60) days plus costs already incurred will exceed seventy-five percent (75%) of the total estimated cost of a task.
6. The Contractor shall prepare financial information as required by the USPTO (See deliverables).

3. GOVERNMENT FURNISHED MATERIAL

None.

4. LEVEL OF EFFORT

This option covers the period through June 30, 2004, however the Government, reserves the right to de-scope this task order at any time. The Government will notify Contractor ten (10) working days prior to termination of the task order.

5. PLACE OF PERFORMANCE

Work will be performed in Crystal City, VA and in the Contractor's leased facilities in Crystal City and Merrifield, VA.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the COTR (electronic form preferred).

Deliverable	Due Date
Progress Reports	10 th day of each Month
File for Robbins-Gioia CAT Updates (USPTO to provide format)	15 th day of each Month
Update USPTO Actual vs. Plan Spreadsheet	3 days after receipt of invoice
Government Furnished Equipment (GFE) List	1 st day of each quarter (Oct, Jan, Apr, Jun)
Asset Discrepancy Report	Daily

Task Orders/Modifications/Resource Estimates	As Required
Cost Proposals/Invoices	As Required
Negotiations/Meetings/Briefings/Presentations	As Required
Administrative Correspondence	As Required
Review and Comment on Key Documents	As Required
Technical and Programmatic Issue Resolution	As Required
Technical Reports/Work Papers/Letters	As Required

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task order.

8. TRAWICK RESPONSE

TO-01, July 1, 2003 – June 30, 2004 – Statement of Work for the FMEUS 2 contract Project Management Task

TRAWICK proposes to perform the work outlined in the above Statement of Work with the following staffing level.

<u>Labor Category</u>	<u>Quantity</u>
[REDACTED]	[REDACTED]
Total	[REDACTED]

The table below summarizes the duties and responsibilities for each function.

<u>Function</u>	<u>Labor Category</u>	<u>Qty</u>	<u>Duties and Responsibilities</u>
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

A. **Resource Summary.** The following table provides a high level summary of all labor hours, labor costs, and ODC costs for the period of July 1, 2003 – June 30, 2004:

	Hours	Cost
Labor		
ODCs		
TOTAL		\$409,482.24

B. **Resources by labor category.** The following table provides a detailed breakdown of labor hours and costs per labor category for the period of July 1, 2003 – June 30, 2004:

Labor Category	Qty	Hours	Rate	Cost
TOTAL				\$409,482.24

ORDER FOR SUPPLIES OR SERVICES

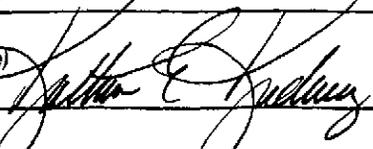
IMPORTANT: Mark all packages and papers with contract and/or order numbers.

1. DATE OF ORDER 01/29/2003		2. CONTRACT NO. (If any) 50PAPT201025		6. SHIP TO:		
3. ORDER NO. 56PAPT305022		4. REQUISITION/REFERENCE NO. 193P0330053		a. NAME OF CONSIGNEE No Shipping Information		
5. ISSUING OFFICE (Address correspondence to) Office of Procurement U.S. Patent and Trademark Office 2011 Crystal Drive, Suite 810 Arlington VA 22202				b. STREET ADDRESS		
7. TO:				c. CITY		d. STATE
NAME OF CONTRACTOR Carol Trawick				e. ZIP CODE		
COMPANY NAME Trawick and Associates				f. SHIP VIA		
STREET ADDRESS 6900 Wisconsin Avenue, Suite 400				8. TYPE OF ORDER		
CITY Bethesda				e. STATE MD		f. ZIP CODE 20815
ACCOUNTING AND APPROPRIATION DATA a Funding Detail				10. REQUISITIONING OFFICE OCIO/DeITS/Office of Customer Support Services		
9. BUSINESS CLASSIFICATION (Check appropriate box(es)) <input checked="" type="checkbox"/> a. SMALL <input type="checkbox"/> b. OTHER THAN SMALL <input type="checkbox"/> c. DISADVANTAGED <input checked="" type="checkbox"/> d. WOMEN-OWNED						
11. F.O.B. POINT Destination		14. GOVERNMENT B/L NO.		15. DELIVER TO F.O.B. POINT ON OR BEFORE (Date)		16. DISCOUNT TERMS
13. PLACE OF INSPECTION		b. ACCEPTANCE				10 days % 20 days % 30 days % days %

17. SCHEDULE (See reverse for Rejections)

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
SEE LINE ITEM DETAIL						
18. SHIPPING POINT		19. GROSS SHIPPING WEIGHT		20. INVOICE NO.		
21. MAIL INVOICE TO: (703) 305-8083						
a. NAME U.S. Patent and Trademark Office						17(h) TOT. (Cont. pages)
b. STREET ADDRESS (or P.O. Box) Office of Finance, Box 17						
c. CITY Washington		d. STATE DC	e. ZIP CODE 20231			
						17(i) GRAND TOTAL \$693,540.64

SEE BILLING INSTRUCTIONS ON REVERSE

UNITED STATES OF AMERICA BY (Signature)  1/29/03

23. NAME (Typed)
Kate Kudrewicz
TITLE: CONTRACTING/ORDERING OFFICER

**ORDER FOR SUPPLIES OR SERVICES
SC. JULE - CONTINUATION**

PAGE NO.
3 of 12

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER 01/29/2003	CONTRACT NO. 50PAPT201025	ORDER NO. 56PAPT305022
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ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
101	<p><i>This is Task Order 56-PAPT-3-05022 to Contract No. 50-PAPT-2-01025. This task order is for Advanced Problem Resolution. The period of performance is February 1, 2003 through June 30, 2003.</i></p> <p>Reference Requisition: 193P0330053</p> <p>Procurement P.O.C. Kate Kudrewicz, (703) 305-8324. Program Office P.O.C. Tom King, (703) 305-8999. Contractor P.O.C. Elaine Watson, (703) 416-4105.</p>					

TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 171) ⇒ \$0.00

Contract Level Funding Summary	Document Number 56PAPT305022	Title APR TO-02	Page 5 of 12
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2003 - - A - 193100 - - 2570 - - PZERC1 - 193220 - - - - NONCOMP - - - -
\$4,041.00

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - PZERC1 - 193220 - - - - NONCOMP - - - -
\$3,370.50

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - CZPDC1 - 193220 - - - - NONCOMP - - - -
\$4,041.00

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - CZPDC1 - 193220 - - - - NONCOMP - - - -
2,020.50

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - CZJRC1 - 193220 - - - - NONCOMP - - - -
4,041.00

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - CZJRC1 - 193220 - - - - NONCOMP - - - -
\$75.00

Reference Requisition: 193P0330053

Contract Level Funding Summary	Document Number	Title	Page
	56PAPT305022	APR TO-02	6 of 12

2003 - - A - 193100 - - 2570 - - PZOSC1 - 193220 - - - - NONCOMP - - - -
\$5,931.00

Reference Requisition: 193P0330053

1003 - - A - 193100 - - 2570 - - PZOSC1 - 193220 - - - - NONCOMP - - - -
3,370.00

Reference Requisition: 193P0330053

003 - - A - 193100 - - 2570 - - CZSSC1 - 193220 - - - - NONCOMP - - - -
4,041.00

Reference Requisition: 193P0330053

1003 - - A - 193100 - - 2570 - - CZSSC1 - 193220 - - - - NONCOMP - - - -
\$75.00

Reference Requisition: 193P0330053

003 - - A - 193100 - - 2570 - - CZFIC1 - 193220 - - - - NONCOMP - - - -
,041.00

Reference Requisition: 193P0330053

003 - - A - 193100 - - 2570 - - CZFIC1 - 193220 - - - - NONCOMP - - - -
75.00

Reference Requisition: 193P0330053

Contract Level Funding Summary	Document Number	Title	Page
	56PAPT305022	APR TO-02	7 of 12

2003 - - A - 193100 - - 2570 - - GZFC1 - 193220 - - - - NONCOMP - - - -
\$2,020.50

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - DZOGC1 - 193220 - - - - NONCOMP - - - -
\$2,020.50

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - DZOGC1 - 193220 - - - - NONCOMP - - - -
\$2,020.50

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - PZPAC1 - 193220 - - - - NONCOMP - - - -
\$3,370.50

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - PZFSC1 - 193220 - - - - NONCOMP - - - -
\$1,350.00

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - PZMRC1 - 193220 - - - - NONCOMP - - - -
\$450.00

Reference Requisition: 193P0330053

Contract Level Funding Summary	Document Nur 56PAPT305022	Title APR TO-02	Page 8 of 12
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003 - - A - 193100 - - 2570 - - PZPPC1 - 193220 - - - - NONCOMP - - - -
3,370.50

Reference Requisition: 193P0330053

003 - - A - 193100 - - 2570 - - PZCTC1 - 193220 - - - - NONCOMP - - - -
1,714.50

Reference Requisition: 193P0330053

003 - - A - 193100 - - 2570 - - PZASC1 - 193220 - - - - NONCOMP - - - -
1,370.50

Reference Requisition: 193P0330053

003 - - A - 193100 - - 2570 - - PZRIC1 - 193220 - - - - NONCOMP - - - -
,020.50

Reference Requisition: 193P0330053

003 - - A - 193100 - - 2570 - - PZADC1 - 193220 - - - - NONCOMP - - - -
,020.50

Reference Requisition: 193P0330053

003 - - A - 193100 - - 2570 - - PZSHC1 - 193220 - - - - NONCOMP - - - -
370.50

Reference Requisition: 193P0330053

Contract Level Funding Summary	Document Number 56PAPT305024	Title APR TO-02	Page 9 of 12
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2003 - - A - 193100 - - 2570 - - PZFLC1 - 193220 - - - - NONCOMP - - - -
\$5,931.00

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - DZIDC1 - 193220 - - - - NONCOMP - - - -
\$2,020.50

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - CZRGC1 - 193220 - - - - NONCOMP - - - -
\$5,931.00

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - CZRGC1 - 193220 - - - - NONCOMP - - - -
\$2,020.50

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - TZTRC1 - 193220 - - - - NONCOMP - - - -
\$675.00

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - TZCRC1 - 193220 - - - - NONCOMP - - - -
\$1,642.50

Reference Requisition: 193P0330053

Contract Level Funding Summary	Document Number 56PAPT305022	Title APR TO-02	Page 10 of 12
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2003 - - A - 193100 - - 2570 - - TZCRC1 - 193220 - - - - NONCOMP - - - -
\$477.00

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - TZCRC1 - 193220 - - - - NONCOMP - - - -
1,714.50

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - TZT2C1 - 193220 - - - - NONCOMP - - - -
5,031.00

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - TZT2C1 - 193220 - - - - NONCOMP - - - -
1,020.50

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - TZISC1 - 193220 - - - - NONCOMP - - - -
1,876.00

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - TZUPC1 - 193220 - - - - NONCOMP - - - -
75.00

Reference Requisition: 193P0330053

Contract Level Funding Summary	Document Num 56PAPT305022	Title APR TO-02	Page 11 of 12
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2003 - - A - 193100 - - 2570 - - TZWHC1 - 193220 - - - - NONCOMP - - - -
\$3,370.50

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - TZTMC1 - 193220 - - - - NONCOMP - - - -
\$2,857.50

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - TZNTC1 - 193220 - - - - NONCOMP - - - -
\$675.00

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - PZWTC1 - 193220 - - - - NONCOMP - - - -
\$3,370.50

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - TZTXC1 - 193220 - - - - NONCOMP - - - -
\$2,020.50

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - PZASC1 - 193220 - - - - NONCOMP - - - -
\$11,142.00

Reference Requisition: 193P0330053

Contract Level Funding Summary	Document Number 56PAPT305022	Title APR TO-02	Page 12 of 12
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2003 - - A - 193100 - - 2570 - - CZRGC1 - 193220 - - - - NONCOMP - - - -
\$151,947.00

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - M50018 - 193220 - - - - NONCOMP - - - -
\$383,560.00

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - DZUPC1 - 193220 - - - - NONCOMP - - - -
\$11,137.50

Reference Requisition: 193P0330053

2003 - - A - 193100 - - 2570 - - M50018 - 193220 - - - - NONCOMP - - - -
1,155.14

Reference Requisition: 193P0330053

Total Funding: \$693,540.64

ADVANCED PROBLEM RESOLUTION
TASK ORDER TO-02

CONTRACT NO.: 50-PAPT-2-01025 ORDER NO.: 56-PAPT-3-05022
 EFFECTIVE DATE: February 1, 2003
 REQUISITION NO.: 193P0330053

ISSUED BY: U.S. PATENT AND TRADEMARK OFFICE
 OFFICE OF PROCUREMENT
 BOX 6
 WASHINGTON, DC 20231

ISSUED TO: TRAWICK AND ASSOCIATES
 6900 WISCONSON AVENUE
 SUITE 400
 BETHESDA, MD 20815

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL (Not-to-exceed) cost for TO-02				\$693,540.64

This task order is issued pursuant to the authority of the Contracting Officer and Special Contract Requirements, Clause H.17. TASK ORDERS PROCEDURES of the contract.

The contractor shall provide the necessary personnel and materials to accomplish this task in accordance with the statement of work, task list, and contractor work plan as approved and attached. The Contractor or any of its subcontractors shall not exceed the ceiling amount provided above in performance of this task order, without prior written approval and an executed modification to this task order.

The effective period of performance of this delivery/task order shall be from the effective date of this order through June 30, 2003, unless otherwise mutually agreed upon and properly modified by the Contracting Officer and Trawick and Associates.

Office of the Chief Information Officer FMEUS2 Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999 Jack Bowles 305-8823	Advanced Problem Resolution Support (TO-02)	Carol Eakins (Acting)

1. BACKGROUND

The US Patent and Trademark Office (PTO) continually updates its information system infrastructure. Changes include the introduction of new, more complex technology for both hardware and automated information systems. Concurrently, USPTO has to continue to operate and maintain existing, legacy technology.

The purpose of this task is to allow the Office of the Chief Information Officer (OCIO) to more quickly resolve any problems that occur with either the new or the old technology assets, to provide dedicated support to many of the more critical systems and to more quickly respond to escalated problems and issues.

2. STATEMENT OF WORK

Contractor shall abide by all OCIO Task Manager Directives, Service Level Agreements (SLA), Operational Support Plans and Technical Notes and shall conform to the policies and procedures defined in the OCSS Customer Support Manual during the performance of job duties.

1. Contractor shall provide support Monday through Friday, 6:30 AM to 6:00 PM (excluding federal holidays). This support will include but not be limited to providing assistance to the OCIO Help Desk in resolving complex problems escalated to the APR Team for resolution.
2. Contractor shall use the Enterprise Asset Management System (EAMS) to thoroughly document all activity related to customer problems, service requests, or change requests – known as Problem Records (PR), Service Records (SR) or Change Records (CR) respectively. Contractor shall update the appropriate record with detailed information regarding work performed towards resolving the request, or receiving communication from the customer, or the assignee related to that record.
3. If Contractor performs a site visit, Contractor shall always leave a completed Work Order Form with the customer. If the customer is at the site, Contractor shall notify the customer and provide a status of work performed before leaving the site.
4. Contractor shall mark records “Resolved” only AFTER the customer has verified that the service has been performed or the problem has been resolved to the customer’s

satisfaction. An exception is made if 3 attempts to contact a customer, over a 3-day period do not produce a response from the customer.

5. Contractor shall perform a Root Cause Analysis (RCA), for problems that they resolve, when requested by the Task Manager.
6. Contractor shall maintain a minimum 95% customer satisfaction rating at all times for tickets directly assigned to the APR Team. This translates to Contractor receiving no more than 5% "re-opened" and "unsatisfactory" ratings. Ratings will be measured through the Customer Quality Check (CQC) process. The rating levels given during the quality checks are: outstanding, very good, satisfactory, unsatisfactory and re-open.
7. Contractor shall follow up on tickets originally assigned to other support groups that receive a "Re-open" or "Unsatisfactory" rating during the CQC process and report back to the HDSO CQC Team leader with a status of the re-open.
8. On a daily basis, the Contractor shall review reports of open Problem and Service Records and take appropriate action to escalate those that extend beyond OCIO service level commitments. This action shall include, but not necessarily be limited to:
 - Contacting the assignee to confirm awareness of the problem or request
 - Contacting other groups or individuals, as called for in the Operational Support Plans, to work on aspects of the problem/request
 - Providing trouble-shooting assistance, including at the customer site, when directed to do so by the Task Manager
 - Updating the Task Manager in regards to the status of the issue
 - Ensuring that the Help Desk or the assignee is notifying the customer of any progress in resolving the problem
 - Documenting trouble-shooting procedures that the Help Desk should follow if similar problems occur in the future
9. The Contractor shall analyze problem records for possible trends as requested by the Task Manager. The types of trends may include unanticipated problems caused by the implementation of a change and problems that are reported by individual customers but actually impact multiple customers (examples: line outage, router failure).
10. The Contractor shall review all draft Operational Support Plans for accuracy and completeness. The Contractor shall provide their written comments to the OSP Management Team within five (5) working days of receiving a plan following the prescribed procedures of the OSP Management Team.
11. The Contractor shall develop Knowledge Paks for USPTO systems, and will assist in the development of standards and naming conventions for USPTO Knowledge Paks and document the same. The Contractor shall ensure that new Knowledge Paks are

ready for deployment within two (2) months of beginning development. The Contractor shall review problem records and CPNs for relevant information to update existing Knowledge Paks in accordance with USPTO procedures. The Contractor shall document the time spent per each KPAK for reporting purposes.

12. Contractor shall provide on-site support to over one hundred (100) Trademark Work at Home participants. Contractor shall provide the support in accordance to the terms of the Trademark Work at Home Service Level Agreement.
13. The Contractor shall provide enhanced support for the Automated Information Systems (AIS) listed below. Support for these systems includes attending customer status meetings, responding to escalated problem reports that can not be handled by the Help Desk or Desktop Field Support, coordinating installation of AIS-specific software and/or hardware when necessary to meet a critical deadline, and serving as a liaison between the customer contacts and the OCIO support organizations.
 - PACR
 - RAM
 - UPWS
 - FPAS
 - CRF and EIC LANs in the USPTO's Scientific and Technical Information Center (STIC) Library.
14. Contractor shall provide support for the Information Technology Testing Division (ITTD) to include the services listed below. The Contractor shall complete these services within five (5) hours of receiving the request. Services are to be performed on-site in the IT Test Facility [ITTF] whenever possible.
 - Verification of current baseline/cost center[s] prior to testing.
 - Reloading of the appropriate baseline/cost center[s] prior to testing.
 - Coordination of SMS push packages to the appropriate workstations.
 - Verification and/or reissuing of test user account[s] and password[s].
 - Verification of proper network configuration, connections and profiles for the applicable cost-center network servers[s].
 - Coordination with help desk [and others, as required] of ITTD hardware and/or software problem resolution[s].
15. Contractor shall provide support for the Automated Biotechnology Sequence Search (ABSS) System and its equipment as indicated below:
 - Check Sun workstations (18 in Crystal Mall 1) daily (types: sparcworkstation10, 20, ultra-1, ultra-2)
 - Online status/Network connections
 - NFS mounts – Check that shared drives from the main/master server are usable
 - Disks – Check that local disk mounts are usable
 - QMS network printers, two types, four - QMS4060 and four - QMS3825:
 - Online status/Network connections
 - Printing problems -

- User level maintenance/IBM (QMS) technical level maintenance – place calls to IBM for service.

16. Contractor staff should be Microsoft Certified Systems Engineers. They shall possess a background in either systems programming, network engineering, or security administration

3. GOVERNMENT FURNISHED MATERIAL

The Government shall furnish workspace, telephone systems, and all pertinent documentation.

4. LEVEL OF EFFORT

No work will be performed under this Task Order without the written direction of the COTR. This option covers the period through June 30, 2003, however the Government, reserves the right to de-scope this task order at any time. The Government will notify Contractor ten (10) working days prior to termination of the task order.

5. PLACE OF PERFORMANCE

Work shall be performed throughout the various buildings occupied by the PTO in Crystal City, VA and in the contractor-leased facilities in Crystal City, VA., Springfield, Va., and Alexandria, VA.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the USPTO COTR and Task Managers (electronic form required).

Deliverable	Schedule
Monthly status report to include a synopsis of work performed during a week to include the number of tickets resolved, OSPs reviewed, and the number of hours worked on each area of responsibility.	by the 10 th of each month.
Comments on new Operational Support Plans	within five (5) working days of plan receipt
Root Cause Analysis	Within in two (2) days of assignment

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task.

8. TRAWICK RESPONSE

TO-02, February 1, 2003 – June 30, 2003 – Statement of Work, Revision 2 for the Advanced Problem Resolution Task – FMEUS2 contract

TRAWICK proposes to perform the work specified in the Statement of Work for the period February 1, 2003 – June 30, 2003 with the following staffing level:

Labor Category	Quantity
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
Total	[REDACTED]

The following table represents the functional responsibilities, staffing levels, and labor categories selected to perform the work specified in the Statement of Work.

Responsibilities Matrix			
Function	Labor Category	Qty	Duties and Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

Responsibilities Matrix			
Function	Labor Category	Qty	Duties and Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169



A. **Resource Summary.** The following table provides a high level summary of all labor hours, labor costs, and ODC costs for period of February 1, 2003 – June 30, 2003:

	Hours	Cost
Labor	[REDACTED]	[REDACTED]
ODCs	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	\$693,540.64

B. **Resources by labor category.** The following table provides a detailed break-down of labor hours and costs per labor category for period of February 1, 2003 – June 30, 2003:

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	[REDACTED]	[REDACTED]	\$693,540.64

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

1. CONTRACT ID CODE _____ Page 1 of 3

2. AMENDMENT/MODIFICATION NO. 0001 3. EFFECTIVE DATE 04/11/2003 4. REQUISITION/PURCHASE REQ. NO. See Funding Detail 5. PROJECT NO. (If applicable) _____

6. ISSUED BY CODE 17 OFFICE OF PROCUREMENT, U.S. Patent and Trademark Office, 2011 Crystal Drive, Suite 810 Arlington, VA 22202 7. ADMINISTERED BY (If other than Item 6) CODE _____

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and Zip Code)
 Carol Trawick
 Trawick and Associates
 6900 Wisconsin Avenue, Suite 400
 Bethesda, MD 20815
 9A. AMENDMENT OF SOLICITATION NO. _____
 9B. DATED (SEE ITEM 11) _____
 10A. MODIFICATION OF CONTRACT/ORDER NO. 50PAPT201025 / 56PAPT305022 (X)
 10B. DATED (SEE ITEM 13) 01/29/2003 (X)

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers is extended, is not extended.
 Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:
 (a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (If required)
 2003 - - A - 150997 - - 2528 - - C25191 - 150997 - - - - NONCOMP - - - - \$32,056.64

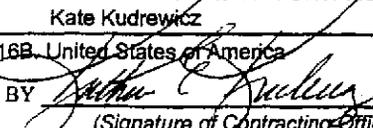
13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

- CHECK ONE**
- A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
 - B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
 - C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
 - D. OTHER (Specify type of modification and authority)
 The Task Order Clause and Changes Clause of the Contract.

IMPORTANT: Contractor is not, is required to sign this document and return _____ copies to the issuing office.

DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)
 is Modification MO01 to Task Order 56-PAPT-3-05022. See attached.

As provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

14. NAME AND TITLE OF SIGNER (Type or print)	15C. DATE SIGNED	16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) Kate Kudrewicz	16C. DATE SIGNED
15. CONTRACTOR/OFFEROR		16B. United States of America BY  (Signature of Contracting Officer)	04/11/2003
(Signature of person authorized to sign)			

Line Item Summary	Document Number 56PAPT305022/0001	Title APR TO-02 Mod 1	Page 2 of 3
--------------------------	---------------------------------------------	---------------------------------	-----------------------

FYs Fund Budget Org Sub Object Class Sub Program Cost Org Sub Proj/Job No. Sub Reporting Category

Division Closed FYs Cancelled Fund

Line Item Number	Description	Delivery Date (Start date to End date)	Quantity	Unit of Issue	Unit Price	Total Cost
------------------	-------------	-------------------------------------------	----------	---------------	------------	------------

This is Task Order 56-PAPT-3-05022 to Contract No. 50-PAPT-2-01025. This task order is for Advanced Problem Resolution. The period of performance is February 1, 2003 through June 30, 2003.

No Changed Line Item Fields

Previous Total: \$693,540.64
Modification Total: \$32,056.64
Grand Total: \$725,597.28

Procurement P.O.C. Kate Kudrewicz, (703) 305-8324. Program Office P.O.C. Tom King, (703) 305-8999. Contractor P.O.C. Elaine Watson, (703) 416-4105.

Contract Level Funding Summary	Document Num' 56PAPT305022/0001	Title APR TO-02 Mod 1	Page 3 of 3
-------------------------------------------	-------------------------------------------	---------------------------------	-----------------------

Funding Strip Code
2003 - - A - 150997 - - 2528 - - C25191 - 150997 - - - - NONCOMP - - - -

Change in Funded Amount
\$32,056.64

Reference Requisition: 150P0330102

ADVANCED PROBLEM RESOLUTION
TASK ORDER TO-02 Modification MO01

CONTRACT NO.: 50-PAPT-2-01025 ORDER NO.: 56-PAPT-3-05022/0001
 EFFECTIVE DATE: April 14, 2003
 REQUISITION NO.: 150P0330102

ISSUED BY: U.S. PATENT AND TRADEMARK OFFICE
 OFFICE OF PROCUREMENT
 BOX 6
 WASHINGTON, DC 20231

ISSUED TO: TRAWICK AND ASSOCIATES
 6900 WISCONSON AVENUE
 SUITE 400
 BETHESDA, MD 20815

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL (Not-to-exceed) cost for TO-02 and Modifications	[REDACTED]	[REDACTED]	[REDACTED]	\$725,597.28

Previous Total	\$693,540.64
Modification MO01 Total	\$ 32,056.64
Total (Not-to-exceed) cost for TO-02 and Modifications	\$725,597.28

This task order is issued pursuant to the authority of the Contracting Officer and Special Contract Requirements, Clause H.17. TASK ORDERS PROCEDURES of the contract.

The contractor shall provide the necessary personnel and materials to accomplish this task in accordance with the statement of work, task list, and contractor work plan as approved and attached. The Contractor or any of its subcontractors shall not exceed the ceiling amount provided above in performance of this task order, without prior written approval and an executed modification to this task order.

The effective period of performance of this delivery/task order shall be from the effective date of this order through June 30, 2003, unless otherwise mutually agreed upon and properly modified by the Contracting Officer and Trawick and Associates.

Office of the Chief Information Officer FMEUS2 Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999 Jack Bowles 305-8823	Advanced Problem Resolution Support (TO-02 Mod 1)	Carol Eakins

1. BACKGROUND

The US Patent and Trademark Office (PTO) continually updates its information system infrastructure. Changes include the introduction of new, more complex technology for both hardware and automated information systems. Concurrently, USPTO has to continue to operate and maintain existing, legacy technology.

The purpose of this task is to allow the Office of the Chief Information Officer (OCIO) to more quickly resolve any problems that occur with either the new or the old technology assets, to provide dedicated support to many of the more critical systems and to more quickly respond to escalated problems and issues.

2. STATEMENT OF WORK

Contractor shall abide by all OCIO Task Manager Directives, Service Level Agreements (SLA), Operational Support Plans and Technical Notes and shall conform to the policies and procedures defined in the OCSS Customer Support Manual during the performance of job duties.

1. Contractor shall provide support Monday through Friday, 6:30 AM to 6:00 PM (excluding federal holidays). This support will include but not be limited to providing assistance to the OCIO Help Desk in resolving complex problems escalated to the APR Team for resolution.
2. Contractor shall use the Enterprise Asset Management System (EAMS) to thoroughly document all activity related to customer problems, service requests, or change requests – known as Problem Records (PR), Service Records (SR) or Change Records (CR) respectively. Contractor shall update the appropriate record with detailed information regarding work performed towards resolving the request, or receiving communication from the customer, or the assignee related to that record.
3. If Contractor performs a site visit, Contractor shall always leave a completed Work Order Form with the customer. If the customer is at the site, Contractor shall notify the customer and provide a status of work performed before leaving the site.
4. Contractor shall mark records “Resolved” only AFTER the customer has verified that the service has been performed or the problem has been resolved to the customer’s

satisfaction. An exception is made if 3 attempts to contact a customer, over a 3-day period do not produce a response from the customer.

5. Contractor shall perform a Root Cause Analysis (RCA), for problems that they resolve, when requested by the Task Manager.
6. Contractor shall maintain a minimum 95% customer satisfaction rating at all times for tickets directly assigned to the APR Team. This translates to Contractor receiving no more than 5% "re-opened" and "unsatisfactory" ratings. Ratings will be measured through the Customer Quality Check (CQC) process. The rating levels given during the quality checks are: outstanding, very good, satisfactory, unsatisfactory and re-open.
7. Contractor shall follow up on tickets originally assigned to other support groups that receive a "Re-open" or "Unsatisfactory" rating during the CQC process and report back to the HDSO CQC Team leader with a status of the re-open.
8. On a daily basis, the Contractor shall review reports of open Problem and Service Records and take appropriate action to escalate those that extend beyond OCIO service level commitments. This action shall include, but not necessarily be limited to:
 - Contacting the assignee to confirm awareness of the problem or request
 - Contacting other groups or individuals, as called for in the Operational Support Plans, to work on aspects of the problem/request
 - Providing trouble-shooting assistance, including at the customer site, when directed to do so by the Task Manager
 - Updating the Task Manager in regards to the status of the issue
 - Ensuring that the Help Desk or the assignee is notifying the customer of any progress in resolving the problem
 - Documenting trouble-shooting procedures that the Help Desk should follow if similar problems occur in the future
9. The Contractor shall analyze problem records for possible trends as requested by the Task Manager. The types of trends may include unanticipated problems caused by the implementation of a change and problems that are reported by individual customers but actually impact multiple customers (examples: line outage, router failure).
10. The Contractor shall review all draft Operational Support Plans for accuracy and completeness. The Contractor shall provide their written comments to the OSP Management Team within five (5) working days of receiving a plan following the prescribed procedures of the OSP Management Team.
11. The Contractor shall develop Knowledge Paks for USPTO systems, and will assist in the development of standards and naming conventions for USPTO Knowledge Paks and document the same. The Contractor shall ensure that new Knowledge Paks are

ready for deployment within two (2) months of beginning development. The Contractor shall review problem records and CPNs for relevant information to update existing Knowledge Paks in accordance with USPTO procedures. The Contractor shall document the time spent per each KPAK for reporting purposes.

12. Contractor shall provide on-site support to over one hundred (100) Trademark Work at Home participants. Contractor shall provide the support in accordance to the terms of the Trademark Work at Home Service Level Agreement.
13. The Contractor shall provide enhanced support for the Automated Information Systems (AIS) listed below. Support for these systems includes attending customer status meetings, responding to escalated problem reports that can not be handled by the Help Desk or Desktop Field Support, coordinating installation of AIS-specific software and/or hardware when necessary to meet a critical deadline, and serving as a liaison between the customer contacts and the OCIO support organizations.
 - PACR
 - RAM
 - UPWS
 - FPAS
 - CRF and EIC LANs in the USPTO's Scientific and Technical Information Center (STIC) Library.
14. Contractor shall provide support for the Information Technology Testing Division (ITTD) to include the services listed below. The Contractor shall complete these services within five (5) hours of receiving the request. Services are to be performed on-site in the IT Test Facility [ITTF] whenever possible.
 - Verification of current baseline/cost center[s] prior to testing.
 - Reloading of the appropriate baseline/cost center[s] prior to testing.
 - Coordination of SMS push packages to the appropriate workstations.
 - Verification and/or reissuing of test user account[s] and password[s].
 - Verification of proper network configuration, connections and profiles for the applicable cost-center network servers[s].
 - Coordination with help desk [and others, as required] of ITTD hardware and/or software problem resolution[s].
15. Contractor shall provide support for the Automated Biotechnology Sequence Search (ABSS) System and its equipment as indicated below:
 - Check Sun workstations (18 in Crystal Mall 1) daily (types: sparcworkstation10, 20, ultra-1, ultra-2)
 - Online status/Network connections
 - NFS mounts – Check that shared drives from the main/master server are usable
 - Disks – Check that local disk mounts are usable
 - QMS network printers, two types, four - QMS4060 and four - QMS3825:

- Online status/Network connections
- Printing problems -
- User level maintenance/IBM (QMS) technical level maintenance – place calls to IBM for service.

16. Contractor staff should be Microsoft Certified Systems Engineers. They shall possess a background in either systems programming, network engineering, or security administration

17. The Contractor shall provide dedicated support for the ePhoenix project from April 1, 2003 through June 30, 2003. Support will include: attending customer status meetings, responding to problem reports, and serving as a liaison between the customer contacts and the OCIO support organizations. Coordination with other support organizations may include working with SSSD for coordination of server activities, with NOD in coordination network drops for the various users of ePhoenix. Additionally, the contractor will be responsible for configuring scanning workstations, coordinating new installs, and maintaining workstation images (ghost images) for ePhoenix subsystems.

3. GOVERNMENT FURNISHED MATERIAL

The Government shall furnish workspace, telephone systems, and all pertinent documentation.

4. LEVEL OF EFFORT

No work will be performed under this Task Order without the written direction of the COTR. This option covers the period through June 30, 2003, however the Government, reserves the right to de-scope this task order at any time. The Government will notify Contractor ten (10) working days prior to termination of the task order.

5. PLACE OF PERFORMANCE

Work shall be performed throughout the various buildings occupied by the PTO in Crystal City, VA and in the contractor-leased facilities in Crystal City, VA., Springfield, Va., and Alexandria, VA.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the USPTO COTR and Task Managers (electronic form required).

Deliverable	Schedule
-------------	----------

Monthly status report to include a synopsis of work performed during a week to include the number of tickets resolved, OSPs reviewed, and the number of hours worked on each area of responsibility.	by the 10 th of each month.
Comments on new Operational Support Plans	within five (5) working days of plan receipt
Root Cause Analysis	Within in two (2) days of assignment

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task.

8. TRAWICK RESPONSE

TO-02, February 1, 2003 – June 30, 2003 – Statement of Work, Revision 2 for the Advanced Problem Resolution Task – FMEUS2 contract

TRAWICK proposes to perform the work specified in the Statement of Work for the period February 1, 2003 – June 30, 2003 with the following staffing level:

<u>Labor Category</u>	<u>Quantity</u>
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

The following table represents the functional responsibilities, staffing levels, and labor categories selected to perform the work specified in the Statement of Work.

Responsibilities Matrix			
Function	Labor Category	Obj.	Duties and Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

Responsibilities Matrix			
Function	Labor Category	City	Duties and Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]



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 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

A. **Resource Summary.** The following table provides a high level summary of all labor hours, labor costs, and ODC costs for period of February 1, 2003 – June 30, 2003:

	Hours	Cost
[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	\$693,540.64

B. **Resources by labor category.** The following table provides a detailed break-down of labor hours and costs per labor category for period of February 1, 2003 – June 30, 2003:

Labor Category	City	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	[REDACTED]	[REDACTED]	\$693,540.64

TO-02, Revision 01, April 1, 2003 – June 30, 2003 – This is a response to a request from the COTR for additional requirements as noted above for E-phoenix Support.

[REDACTED]

Labor Category

Quantity

<u>Labor Category</u>	<u>Quantity</u>
[REDACTED]	[REDACTED]

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

The following table represents the functional responsibilities, staffing levels, and labor categories selected to perform the work specified in the Statement of Work.

Responsibilities Matrix			
Function	Labor Category	Qty	Duties and Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

Responsibilities Matrix			
Function	Labor Category	Qty	Duties and Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

[REDACTED]

The following tables provide the total cost of the revised APR Task, TO-02.

A. **Resource Summary.** The following table provides a high level summary of all labor hours, labor costs, and ODC costs for period of February 1, 2003 – June 30, 2003:

	HOURS	COST
[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	\$725,597.28

C. **Resources by labor category.** The following table provides a detailed break-down of labor hours and costs per labor category for period of February 1, 2003 – June 30, 2003 with the exception of the ePhoenix task which is effective from April 14, 2003 – June 30, 2003:

Labor Category	Day	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL				\$725,597.28

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

ORDER FOR SUPPLIES OR SERVICES

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER 01/28/2003	2. CONTRACT NO. (If any) 50PAPT201025	6. SHIP TO: No Contacts Identified
-----------------------------	------------------------------------------	------------------------------------

ORDER NO. 56PAPT305023	4. REQUISITION/REFERENCE NO. 193P0330065	a. NAME OF CONSIGNEE
---------------------------	---------------------------------------------	----------------------

ISSUING OFFICE (Address correspondence to) Office of Procurement J.S. Patent and Trademark Office 2011 Crystal Drive, Suite 810 Arlington VA 22202	b. STREET ADDRESS	c. CITY	d. STATE	e. ZIP CODE
------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-------------------	---------	----------	-------------

7. TO:	f. SHIP VIA
--------	-------------

NAME OF CONTRACTOR Carol Trawick	8. TYPE OF ORDER
-------------------------------------	------------------

COMPANY NAME Trawick and Associates	<input type="checkbox"/> a. PURCHASE REFERENCE YOUR: Please furnish the following on the terms and conditions specified on both sides of this order and on the attached sheet, if any, including delivery as indicated.	<input type="checkbox"/> b. DELIVERY - Except for billing instructions on the reverse, this delivery order is subject to instructions contained on this side only of this form and is issued subject to the terms and conditions of the above-numbered contract.
STREET ADDRESS 6900 Wisconsin Avenue, Suite 400		
CITY Bethesda	e. STATE MD	f. ZIP CODE 20815

ACCOUNTING AND APPROPRIATION DATA 3 - - A - 193100 - - 2570 - - P60013 - 193431 - - - - NONCOMP - - - -	10. REQUISITIONING OFFICE OCIO/DSM/Office of Acquisition Management
------------------------------------------------------------------------------------------------------------	------------------------------------------------------------------------

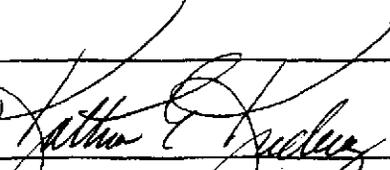
BUSINESS CLASSIFICATION (Check appropriate box(es)) <input checked="" type="checkbox"/> a. SMALL <input type="checkbox"/> b. OTHER THAN SMALL <input type="checkbox"/> c. DISADVANTAGED <input checked="" type="checkbox"/> d. WOMEN-OWNED

F.O.B. POINT Destination	14. GOVERNMENT B/L NO.	15. DELIVER TO F.O.B. POINT ON OR BEFORE (Date)	16. DISCOUNT TERMS 10 days % 20 days % 30 days % days %
13. PLACE OF INSPECTION	b. ACCEPTANCE		

17. SCHEDULE (See reverse for Rejections)

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
	SEE LINE ITEM DETAIL					

18. SHIPPING POINT	19. GROSS SHIPPING WEIGHT	20. INVOICE NO.	17(h) TOT. (Cont. pages)
21. MAIL INVOICE TO: (703) 305-8083			
a. NAME U.S. Patent and Trademark Office			17(i) GRAND TOTAL \$32,938.88
b. STREET ADDRESS (or P.O. Box) Office of Finance, Box 17			
c. CITY Washington	d. STATE DC	e. ZIP CODE 20231	

UNITED STATES OF AMERICA BY (Signature)  1/28/03	23. NAME (Typed) Kate Kudrewicz TITLE: CONTRACTING/ORDERING OFFICER
-------------------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------

**ORDER FOR SUPPLIES OR SERVICES
SCHEDULE - CONTINUATION**

PAGE NO.
3 of 4

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER 01/28/2003	CONTRACT NO. 50PAPT201025	ORDER NO. 56PAPT305023
-----------------------------	------------------------------	---------------------------

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
101	<p><i>This is Task Order 56-PAPT-3-05023 to Contract No. 50-PAPT-2-01025. This task order is for Facilities Management Support. The period of performance is February 1, 2003 through June 30, 2003.</i></p> <p>Reference Requisition: 193P0330065</p> <p><i>Procurement P.O.C. Kate Kudrewicz (703) 305-8324. Program Office COTR, Tom King, (703) 305-8999. Contractor P.O.C. Elaine Watson (703) 416-4105.</i></p>					

TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 171) ⇒ \$0.00

Contract Level Funding Summary	Document Nur 56PAPT305023	Title Facilities Mgmt TO-07	Page 4 of 4
-------------------------------------------	-------------------------------------	---------------------------------------	-----------------------

2003 - - A - 193100 - - 2570 - - P50013 - 193431 - - - - NONCOMP - - - -

\$32,938.88

Reference Requisition: 193P0330065

Total Funding: \$32,938.88

FACILITIES MANAGEMENT SUPPORT
TASK ORDER TO-07

CONTRACT NO.: 50-PAPT-2-01025 ORDER NO.: 56-PAPT-3-05023
EFFECTIVE DATE: February 1, 2003
REQUISITION NO.: 193P0330065

ISSUED BY: U.S. PATENT AND TRADEMARK OFFICE
OFFICE OF PROCUREMENT
BOX 6
WASHINGTON, DC 20231

ISSUED TO: TRAWICK AND ASSOCIATES
6900 WISCONSON AVENUE
SUITE 400
BETHESDA, MD 20815

ACCOUNTING AND APPROPRIATION DATA:

2003 A 193100 2570 P50013 193431 - OBLIGATE \$32,938.88

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL (NOT-TO-EXCEED) COST FOR TO-07				\$32,938.88

This task order is issued pursuant to the authority of the Contracting Officer and Special Contract Requirements, Clause H.17. TASK ORDERS PROCEDURES of the contract.

The contractor shall provide the necessary personnel and materials to accomplish this task in accordance with the statement of work, task list, and contractor work plan as approved and attached. The Contractor or any of its subcontractors shall not exceed the ceiling amount provided above in performance of this task order, without prior written approval and an executed modification to this task order.

The effective period of performance of this delivery/task order shall be from the effective date of this order through June 30, 2003, unless otherwise mutually agreed upon and properly modified by the Contracting Officer and Trawick and Associates.

Office of the Chief Information Officer FMEUS2 Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999 Jack Bowles 305-8823	Facilities Management Support (TO-07)	Richard R. Charles 703-305-2051

1. BACKGROUND

The primary mission of the United States Patent and Trademark Office (USPTO) is to issue patents and trademarks. To that end, it is imperative that timely and accurate inventories of hardware and software be flawlessly managed as an integral part of the USPTO Data Center's successful day-to-day operations. The USPTO Data Center requires a full-time, on-site contractor support services in the area of server inventory (both software and hardware), asset management, IT Facilities Management System (ITFMS), shipping and receiving, and waste management to ensure that the USPTO meets and or exceeds in accomplishing its mission is essential.

2. STATEMENT OF WORK

Server Inventory

The Contractor shall perform maintenance of existing hardware and software reports. Adding new servers, as required, update with new information, and moving servers that have been replaced. Gather information from existing servers and/or packing slips when new servers are received.

A. Asset Management

The Contractor shall provide physical inventory, to include description, location, serial number, model number, and USPTO asset management numbers of all equipment managed by the Data Center. Using established USPTO procedures for tagging new equipment that has been received and to surplus equipment that no longer has a value to the USPTO, must be strictly followed. The Contractor shall provide asset management in the areas of:

- Physical Inventory
- Tagging New Assets
- Surplus of Old Assets

B. Shipping and Receiving

The Contractor shall perform the receiving and documentation of the new hardware from vendors or in-house transfers. Must be able to properly prepare equipment for shipping, whether it is from one building to another or from one office space to another, in accordance with established procedures.

C. IT Facilities Management System (ITFMS)

The Contractor shall perform as the Assistant Site Administrator. This position is responsible for the day-to-day updating of the Data Center drawing and all its reports. The Contractor will draw new hardware, as required, move hardware on the drawing, and delete hardware from the drawing. This work must be completed within eight (8) business hours of any change to the Data Center per the ITFMS Policies and Procedures document dated October 1, 2001.

D. Waste Management

The Contractor shall, as required, remove packing material from the Data Center to the loading dock and place the waste in the appropriate compactor. The contractor shall perform a periodic check of the Data Center floor, along with their USPTO counterpart, and collect any unwanted material from the floor. This work shall be performed in an effort to maintain a clean, safe and suitable work environment.

3. GOVERNMENT FURNISHED MATERIAL

The government shall furnish handheld Psion units and all pertinent documentation, access to all staff, workplace, procedures, and material needed to perform this task.

4. LEVEL OF EFFORT

No work outside of the scope of this Task Order will be performed without the written direction of the COTR.

This option covers the period through June 30, 2003, however the Government, reserves the right to de-scope this task order at any time. The Government will notify Contractor ten (10) working days prior to termination of the task order.

5. PLACE OF PERFORMANCE

Work shall be performed predominately in the USPTO Data Center, Production Control, 11th floor, Crystal Park II, Crystal City, VA. It may also require some work throughout the various buildings occupied by the USPTO in Crystal City, Franconia/Springfield, and Newington, VA, as well as in the contractor-leased facilities in Crystal City and Alexandria, VA.

6. **SCHEDULE OF DELIVERABLES**

None

7. **APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)**

AIS-LCM is required under this task.

8. **TRAWICK RESPONSE**

TO-07, February 1, 2003 – June 30, 2003 –Statement of Work for the Facilities Management Task on the FMEUS 2 contract



Labor Category

Quantity

[Redacted]

[Redacted]

Total

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

The staff will perform the following functions:

Responsibilities Matrix			
Function	Labor Category	Qty	Rationale for Staffing Level
[Redacted]	[Redacted]	[Redacted]	[Redacted]

A. **Resource Summary.** The following table provides a high level summary of all labor hours, labor costs, and ODC costs for the period of February 1, 2003 – June 30, 2003:

	Hours	Cost
[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	\$32,938.88

B. Resources by labor category. The following table provides a detailed breakdown of labor hours and costs per labor category for the period February 1, 2003 – June 30, 2003:

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	[REDACTED]	[REDACTED]	\$32,938.88

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

ORDER FOR SUPPLIES OR SERVICES

PAGE 1 OF 4 PAGES

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER 01/28/2003	2. CONTRACT NO. (If any) 50PAPT201025	6. SHIP TO: No Contacts Identified		
ORDER NO. 56PAPT305024	4. REQUISITION/REFERENCE NO. 192P0330061	a. NAME OF CONSIGNEE		
ISSUING OFFICE (Address correspondence to) Office of Procurement U.S. Patent and Trademark Office 2011 Crystal Drive, Suite 810 Arlington VA 22202		b. STREET ADDRESS		
7. TO:		c. CITY	d. STATE	e. ZIP CODE
NAME OF CONTRACTOR Carol Trawick		f. SHIP VIA		
COMPANY NAME Trawick and Associates		8. TYPE OF ORDER		
STREET ADDRESS 6900 Wisconsin Avenue, Suite 400		<input type="checkbox"/> a. PURCHASE REFERENCE YOUR: Please furnish the following on the terms and conditions specified on both sides of this order and on the attached sheet, if any, including delivery as indicated.		
CITY Bethesda	e. STATE MD	f. ZIP CODE 20815	<input type="checkbox"/> b. DELIVERY - Except for billing instructions on the reverse, this delivery order is subject to instructions contained on this side only of this form and is issued subject to the terms and conditions of the above-numbered contract.	
ACCOUNTING AND APPROPRIATION DATA 13 - - A - 192100 - - 2570 - - M50006 - 192221 - - - - NONCOMP - - - -		10. REQUISITIONING OFFICE OCIO/DSM/Office of Acquisition Management		

BUSINESS CLASSIFICATION (Check appropriate box(es))

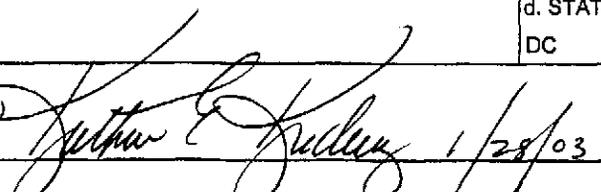
a. SMALL b. OTHER THAN SMALL c. DISADVANTAGED d. WOMEN-OWNED

F.O.B. POINT Destination	14. GOVERNMENT B/L NO.	15. DELIVER TO F.O.B. POINT ON OR BEFORE (Date)	16. DISCOUNT TERMS
13. PLACE OF INSPECTION	b. ACCEPTANCE		10 days % 20 days % 30 days % days %

17. SCHEDULE (See reverse for Rejections)

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
	SEE LINE ITEM DETAIL					

18. SHIPPING POINT	19. GROSS SHIPPING WEIGHT	20. INVOICE NO.	
21. MAIL INVOICE TO: (703) 305-8083			
a. NAME U.S. Patent and Trademark Office			17(h) TOT. (Cont. pages)
b. STREET ADDRESS (or P.O. Box) Office of Finance, Box 17			
c. CITY Washington	d. STATE DC	e. ZIP CODE 20231	\$161,233.28
17(i) GRAND TOTAL			

UNITED STATES OF AMERICA BY (Signature)  1/28/03

23. NAME (Typed)
Kate Kudrewicz
TITLE: CONTRACTING/ORDERING OFFICER

Contract Level Funding Summary	Document Num	Title	Page
	56PAPT305024	IEB Task Order TO-10	4 of 4

2003 - - A - 192100 - - 2570 - - M50006 - 192221 - - - - NONCOMP - - - -

\$161,233.28

Reference Requisition: 192P0330061

Total Funding: \$161,233.28

INFRASTRUCTURE ENGINEERING BRANCH TEST AND EVALUATION
HARDWARE
TASK ORDER TO-10

CONTRACT NO.: 50-PAPT-2-01025 ORDER NO.: 56-PAPT-3-05024
EFFECTIVE DATE: February 1, 2003
REQUISITION NO.: 192P0330061

ISSUED BY: U.S. PATENT AND TRADEMARK OFFICE
OFFICE OF PROCUREMENT
BOX 6
WASHINGTON, DC 20231

ISSUED TO: TRAWICK AND ASSOCIATES
6900 WISCONSON AVENUE
SUITE 400
BETHESDA, MD 20815

ACCOUNTING AND APPROPRIATION DATA:

2003 A 192100 2570 M50006 192221 - OBLIGATE \$161,233.28

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL (NOT-TO-EXCEED) COST FOR TO-10				\$161,233.28

This task order is issued pursuant to the authority of the Contracting Officer and Special Contract Requirements, Clause H.17. TASK ORDERS PROCEDURES of the contract.

The contractor shall provide the necessary personnel and materials to accomplish this task in accordance with the statement of work, task list, and contractor work plan as approved and attached. The Contractor or any of its subcontractors shall not exceed the ceiling amount provided above in performance of this task order, without prior written approval and an executed modification to this task order.

The effective period of performance of this delivery/task order shall be from the effective date of this order through June 30, 2003, unless otherwise mutually agreed upon and properly modified by the Contracting Officer and Trawick and Associates.

Office of the Chief Information Officer IEB and IEB T&E HW Support Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999 Jack Bowles 305-8823	IEB and IEB T&E HW Support (TO-10)	Laurent Lee

IEB Support

Background: The United States Patent and Trademark Office (USPTO), Office of Chief Information Officer (OCIO), maintains a service to test and evaluate any hardware and/or enterprise COTS software that is to be deployed to the desktop either connected to USPTOnet or free standing. The office that performs this duty is currently known as Infrastructure Engineering Branch Test and Evaluation Hardware (IEB T&E HW). Due to expanding requirements of the staff, including software-testing expertise there is a need to increase the quantity of staff.

Task: It has been estimated that IEB requires a minimum of four contract support staff.

1. STATEMENT OF WORK

1. The Contractor shall not make any changes, modifications, alterations, or enhancements to the USPTO's hardware or enterprise level COTS software without detailed change records being approved by the USPTO. In addition, the Contractor must abide by all Service Level Agreements (SLA), Technology Standards and Guidelines (TSG), and Standard Operating Procedures (SOP).
2. The Contractor shall provide support daily on weekdays. Compressed workweeks and flextime are authorized for contractor staff assigned to IEB T&E HW.
3. The Contractor shall receive all assignments from the USPTO Task Manager or designee verbally, electronically via e-mail and/or the USPTO Tracking System(s).
4. In addition to meeting service call response and resolution times; the Contractor shall be required to meet standards of customer satisfaction established by the USPTO. Customer satisfaction measurements shall measure Contractor staff attributes such as professionalism, courtesy, expertise, attitude, and helpfulness.
5. The USPTO will provide all space, equipment and software required to

successfully execute the terms of this task.

6. All documentation, software manuals, diagnostic routines, and any other aids (hereinafter-called documentation) necessary to perform this task shall be provided by the office requesting service, either USPTO or other contractor.
7. The Contractor shall participate in technical evaluations of proposed new desktop or portable hardware and enterprise level COTS software for use at the USPTO. This will include pro-active research in hardware and/or software via direct contact with manufactures, resellers, or Internet as assigned by the PTO Task Manger or designee. The Contractor shall work with the USPTO to certify the serviceability and maintainability of the desktop automation technologies introduced for use at the USPTO.
8. The Contractor shall participate in technical evaluations of proposed new COTS software at the cost center level as appropriate for new hardware testing.
9. The Contractor shall perform configuration management services utilizing USPTO supplied software, currently PVCS, for all associated documentation as needed to support the configuration identification and management of the desktop hardware and for all enterprise COTS software packages selected for deployment by IEB.
10. The Contractor shall perform a Root Cause Analysis (RCA) for desktop or portable hardware and/or software problems when requested by the USPTO for services covered by IEB.
11. The Contractor shall provide baseline configuration, documentation, and deployment strategy for all enterprise COTS desktop enhancements and changes. The Contractor shall ensure the currency of all operational documentation.
12. The USPTO shall provide the Contractor access to maintenance tracking systems. Currently, the tracking system used by the USPTO is EAMS. In opening, tracking and closing service calls, the Contractor shall adhere to policies and procedures as set by the USPTO.
13. The Contractor shall create a service request record if necessary in a USPTO provided maintenance-tracking system for all calls received from customers via the USPTO Task Manager or problems identified by the Contractor. The Contractor shall close out all calls assigned to IEB in the USPTO's tracking system upon problem resolution.
14. The Contractor shall track all calls assigned to the IEB T&E HW and

recorded in the USPTO's maintenance tracking systems and provide status of such calls as requested. If, within twenty-four (24) hours of the service rendered, the customer reports continued or recurring problems or reports incomplete service, the Contractor shall reopen the service. The Contractor shall retain records of all follow-up calls, including the date, time, and results

15. The contractor shall ensure that notification of pending deployments is provided to the Product Support Services Branch in accordance with the appropriate TSGs so that the notification(s) and coordination will be made with the customer as appropriate.
16. The Contractor shall be responsible for portable microcomputer evaluation including laptop, notebook, and palm top machines. This includes pre-purchase evaluation and software evaluation. Hardware support for laptops is NOT covered in this section.
17. The Contractor shall provide a back up for desktop hardware testing and evaluation.

2. GOVERNMENT FURNISHED MATERIAL

The government will provide all hardware and software necessary to perform any testing including daily use equipment.

3. LEVEL OF EFFORT

No work will be performed under this Task Order without the written direction of the COTR.

This covers the period through June 30, 2003, however the Government, reserves the right to de-scope this task order at any time. The Government will notify Contractor ten (10) working days prior to termination of the task order.

4. PLACE OF PERFORMANCE

Work might be performed throughout the various buildings occupied by the USPTO in Crystal City, VA but will be primarily accomplished in the IEB or ETC Lab.

5. SCHEDULE OF DELIVERABLES

All update deliverables shall be electronically entered in the appropriate USPTO tracking system. The report shall be delivered electronically as an attachment to an e-mail message.

Deliverable		Due
Update	Update of Appropriate Tracking System(s)	As events warrant but no later than 24 hours after completion.
Report	Monthly Status of all projects including completed tasks, works in progress, and potential problems and/or concerns.	2 workdays prior to the 10 th of each month
Item Testing Report	A report shall be issued for each item tested (hardware and/or software) and will be forwarded to the Task Manager as an electronic attachment to an e-mail.	Within 2 workdays of completion.

6. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is not required under this task since it does not involve any software development.

7. TRAWICK RESPONSE

TO-10, February 1, 2003 – June 30, 2003 –Statement of Work for the IEB Task – FMEUS2 contract

TRAWICK proposes to perform the work specified in the Statement of Work for the period February 1, 2003 – June 30, 2003 with the following staffing level:

Labor Category	Qty
[REDACTED]	[REDACTED]
Total	[REDACTED]

The following table represents the functional responsibilities, staffing levels, and labor categories selected to perform the work specified in the Statement of Work.

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

Responsibilities Matrix			
Function	Labor Category	Qty	Duties and Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

A. **Resource Summary.** The following table provides a high level summary of all labor hours, labor costs, and ODC costs for the period of February 1, 2003 – June 30, 2003:

	Hours	Cost
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
TOTAL		\$161,233.28

B. **Resources by labor category.** The following table provides a detailed breakdown of labor hours and costs per labor category for the period of February 1, 2003 – June 30, 2003:

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL				\$161,233.28

ORDER FOR SUPPLIES OR SERVICES

PAGE OF PAGES

1 4

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

1. DATE OF ORDER 01/28/2003		2. CONTRACT NO. (If any) 50PAPT201025		6. SHIP TO: No Contacts Identified	
3. ORDER NO. 56PAPT305025		4. REQUISITION/REFERENCE NO. 193P0330056		a. NAME OF CONSIGNEE	
5. ISSUING OFFICE (Address correspondence to) Office of Procurement U.S. Patent and Trademark Office 2011 Crystal Drive, Suite 810 Arlington VA 22202				b. STREET ADDRESS	
				c. CITY	d. STATE
				e. ZIP CODE	
7. TO:				f. SHIP VIA	
a. NAME OF CONTRACTOR Carol Trawick				8. TYPE OF ORDER	
b. COMPANY NAME Trawick and Associates				<input type="checkbox"/> a. PURCHASE	
c. STREET ADDRESS 6900 Wisconsin Avenue, Suite 400				REFERENCE YOUR:	
j. CITY Bethesda				e. STATE MD	
				f. ZIP CODE 20815	
i. ACCOUNTING AND APPROPRIATION DATA 003 - A - 193100 - - 2570 - - M50015 - 193451 - - - - NONCOMP - - - -				10. REQUISITIONING OFFICE OCIO/DSM/Office of Acquisition Management	

b. DELIVERY - Except for billing instructions on the reverse, this delivery order is subject to instructions contained on this side only of this form and is issued subject to the terms and conditions of the above-numbered contract.

Please furnish the following on the terms and conditions specified on both sides of this order and on the attached sheet, if any, including delivery as indicated.

1. BUSINESS CLASSIFICATION (Check appropriate box(es))			
<input checked="" type="checkbox"/> a. SMALL	<input type="checkbox"/> b. OTHER THAN SMALL	<input type="checkbox"/> c. DISADVANTAGED	<input checked="" type="checkbox"/> d. WOMEN-OWNED
2. F.O.B. POINT Destination		14. GOVERNMENT B/L NO.	15. DELIVER TO F.O.B. POINT ON OR BEFORE (Date)
13. PLACE OF		16. DISCOUNT TERMS	
a. INSPECTION	b. ACCEPTANCE	10 days % 20 days % 30 days % days %	

17. SCHEDULE (See reverse for Rejections)

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
	SEE LINE ITEM DETAIL					

18. SHIPPING POINT		19. GROSS SHIPPING WEIGHT		20. INVOICE NO.		17(h) TOT. (Cont. pages)
21. MAIL INVOICE TO: (703) 305-8083						
a. NAME U.S. Patent and Trademark Office						\$267,549.36
b. STREET ADDRESS (or P.O. Box) Office of Finance, Box 17						
c. CITY Washington		d. STATE DC	e. ZIP CODE 20231			

UNITED STATES OF AMERICA BY (Signature) 		23. NAME (Typed) Kate Kudrewicz TITLE: CONTRACTING/ORDERING OFFICER	
-----------------------------------------------------------------------------------------------------------------------------	--	---------------------------------------------------------------------------	--

**ORDER FOR SUPPLIES OR SERVICES
SCHEDULE - CONTINUATION**

PAGE NO.
3 of 4

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER 01/28/2003	CONTRACT NO. 50PAPT201025	ORDER NO. 56PAPT305025
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ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
001	<p><i>This is Task Order 56-PAPT-3-05025 to Contract No. 50-PAPT-2-01025. This task order is for NT Operating Systems Support. The period of performance is February 1, 2003 through June 30, 2003.</i></p> <p>Reference Requisition: 193P0330056</p> <p>Procurement P.O.C. Kate Kudrewicz (703) 305-8324. Program Office COTR, Tom King, (703) 305-8999. Contractor P.O.C. Elaine Watson, (703) 416-4105.</p>					

TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 171) ⇒ \$0.00

Contract Level Funding Summary	Document Number	Title	Page
	56PAPT305025	NT Operating Sys Spt TO-13	4 of 4

003 - - A - 193100 - - 2570 - - M50015 - 193451 - - - - NONCOMP - - - -

267,549.36

Reference Requisition: 193P0330056

Total Funding: \$267,549.36

NT OPERATING SYSTEMS SUPPORT
TASK ORDER TO-13

CONTRACT NO.: 50-PAPT-2-01025 ORDER NO.: 56-PAPT-3-05025
EFFECTIVE DATE: February 1, 2003
REQUISITION NO.: 193P0330056

ISSUED BY: U.S. PATENT AND TRADEMARK OFFICE
OFFICE OF PROCUREMENT
BOX 6
WASHINGTON, DC 20231

ISSUED TO: TRAWICK AND ASSOCIATES
6900 WISCONSON AVENUE
SUITE 400
BETHESDA, MD 20815

ACCOUNTING AND APPROPRIATION DATA:

2003 A 193100 2570 M50015 193451 - OBLIGATE \$267,549.36

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

Labor Category	Qty	Hours	Rate	COST
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL (NOT-TO-EXCEED)	[REDACTED]	[REDACTED]	[REDACTED]	\$267,549.36
COST FOR TO-13	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

This task order is issued pursuant to the authority of the Contracting Officer and Special Contract Requirements, Clause H.17. TASK ORDERS PROCEDURES of the contract.

The contractor shall provide the necessary personnel and materials to accomplish this task in accordance with the statement of work, task list, and contractor work plan as approved and attached. The Contractor or any of its subcontractors shall not exceed the ceiling amount provided above in performance of this task order, without prior written approval and an executed modification to this task order.

The effective period of performance of this delivery/task order shall be from the effective date of this order through June 30, 2003, unless otherwise mutually agreed upon and properly modified by the Contracting Officer and Trawick and Associates.

Office of the Chief Information Officer FMEUS2 Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999 Jack Bowles 305-8823	NT Operating Systems Support (TO-13)	Dace Galen 305-9195

1. BACKGROUND

The Systems Software Services Division (SSSD) provides support to the operations staff and application programmers by maintaining the Windows NT or Windows 2000 operating system on Windows NT Server. This involves ongoing activity in the areas of the Windows NT system software, NT systems administration, TCP/IP, Internet services, hardware configuration upgrades, and automated operations. Operating system support involves the maintenance/upgrades to products from Microsoft, Input Accel, Eastman, NetIQ, Veritas and others. The objective of this task is to augment current staff by providing operating system and telecommunication software support to SSSD.

The Contractor shall provide Windows NT systems programming for NT Server and telecommunications support to augment the current staff of the Systems Software Division. This Work Plan covers planned activities and resources from 02/01/2003 – 06/30/03.

2. STATEMENT OF WORK

- (1) The Contractor shall provide technical services to maintain the production and development environments for the Windows AIS Application servers running on the Windows NT and Windows 2000 Operating Systems. This will include periodic software upgrades to Windows NT/2000 Servers, and to all other vendor supported system software.
- (2) The Contractor shall provide technical services to develop, program, test and implement system software utilities for the Windows NT/2000 based application platforms. All new programs and processes will operate in an "unattended operations" central computer environment. The contractor shall provide documentation of the procedures and methodology applicable to the programs and processes.
- (3) The Contractor shall provide technical support and troubleshooting assistance for the application development community by answering questions on application interfaces to the operating system, and identifying production anomalies to developers for their corrective action. This task will be a continuous effort.

- (4) The Contractor shall provide technical services required for any necessary hardware upgrades and maintenance, including monitoring the performance of existing hardware. This task will be a continuous effort.
- (5) The Contractor shall provide support for day-to-day operational support, troubleshooting problem records assigned, and taking proper corrective actions. This may involve complete reloading of servers, identification of complex operating system problems, and proper recovery and/or corrective actions.
- (6) The Contractor shall assist the USPTO personnel in the installation of system software during non-production hours. The Contractor shall provide off-hour on-call support following the installation of any system software processes or hardware. Non-production and off-hour support is defined as outside principal period of performance hours. The Contractor shall periodically provide 24-hour on-call support as assigned.
- (7) The Contractor shall analyze assigned tasks and provide estimated time frames to complete to the Task Manager or designated representative. The Task Manager will do an independent time assessment and the deadline will be negotiated.
- (8) The Contractor shall use the production Problem/Change Management system to track all problems and changes. Work will be documented in problem and/or change records and appropriate OCIO approval will be acquired for all changes made.
- (9) The Contractor shall provide on-site technical services to monitor and maintain in a 12x5 (Monday through Friday: 6:00 PM – 6:00 AM) and 24x2 or 3 (Saturday, Sunday and Holidays – 24 hours) to cover weekends and holiday environments, the Windows NT AIS servers. These tasks include and are not limited to: maintaining the uptime requirements of each server as documented in the Operational Support plan, backup monitoring, software installation, software upgrades to the Operating System, installation of patches, password administration and media, hardware, and software defect recoveries.

The contractor must cover all shifts managed by the task order for the full duration of the shift 100% of the time. The contractor must manage personnel requests for personal days and vacation.

A face-to-face or phone turnover to another system administrator, either contractor or PTO FTE is required 100% of the time when a production server is down even if it requires extending a shift.

All shifts must have an experienced fully privileged system administrator on site.

Contractor system administrator while on site **must be reachable 100%** of the time. When leaving the system administrator's office area, the contractor shall carry a portable

phone so that they can be reached in all monitoring locations and computer rooms. Calls from the central monitoring facility must be forwarded to that portable phone if only one person covers the shift and they are required to leave the facility. The portable phone should be shared so that multiple numbers do not have to be posted in the Help Desk.

3. GOVERNMENT FURNISHED MATERIAL

The USPTO will provide workspace, equipment, tools, and supplies required to perform the task assigned to the System Software Programmer while on-site at the USPTO with the exception of desktop workstations

4. LEVEL OF EFFORT

The amount of work required to perform this task may vary from day to day. However, the Contractor is responsible for ensuring all work is performed within the time frame established by the USPTO Task Manager at time of assignment. This option covers the period through June 30, 2003, however the Government, reserves the right to de-scope this task order at any time. The Government will notify Contractor ten (10) working days prior to termination of the task order.

5. PLACE OF PERFORMANCE

Work will be performed at the USPTO facility.

6. SCHEDULE OF DELIVERABLES

Deliverables		Due Date
Status Report	Weekly Status Report for this task	Weekly
Problem /Change Records	Problem and change records fully documenting work done on problems, changes, and projects.	Ongoing

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task.

8. TRAWICK RESPONSE

TO-13, February 1, 2003 – June 30, 2003 –Statement of Work for the SSSD NT Operating Systems Support – FMEUS2 contract

TRAWICK proposes to perform the work specified in the Statement of Work for the period February 1, 2003 – June 30, 2003 with the following staffing level:

Labor Category	Quantity
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
Total	[REDACTED]

This staffing level satisfies the additional requirements documented in the Statement of Work for on-site availability of an NT administrator for all shifts.

The following table represents the functional responsibilities, staffing levels, and labor categories selected to perform the work specified in the Statement of Work.

Responsibilities Matrix			
Function	Labor Category	Qty	Duties and Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

The following provides detailed labor hour and cost estimates for the work.

- A. **Resource Summary.** The following table provides a high level summary for all labor hours, labor costs, and ODC costs for the period of February 1, 2003 – June 30, 2003:

	Hours	Cost
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	\$267,549.36

- B. **Resources by labor category.** The following table provides a detailed breakdown of labor hours and costs per labor category for the period of February 1, 2003 – June 30, 2003:

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	[REDACTED]	[REDACTED]	\$267,549.36

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

ORDER FOR SUPPLIES OR SERVICES

PAGE 1 OF 4 PAGES

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

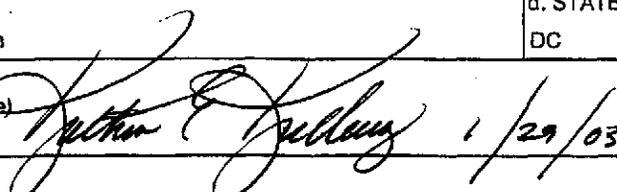
DATE OF ORDER 01/29/2003		2. CONTRACT NO. (If any) 50PAPT201025		6. SHIP TO: No Contacts Identified	
ORDER NO. 56PAPT305026		4. REQUISITION/REFERENCE NO. 193P0330055		a. NAME OF CONSIGNEE	
ISSUING OFFICE (Address correspondence to) Office of Procurement U.S. Patent and Trademark Office 2011 Crystal Drive, Suite 810 Arlington VA 22202				b. STREET ADDRESS	
7. TO:		c. CITY		d. STATE	e. ZIP CODE
NAME OF CONTRACTOR Carol Trawick		f. SHIP VIA			
COMPANY NAME Trawick and Associates		8. TYPE OF ORDER			
STREET ADDRESS 6900 Wisconsin Avenue, Suite 400		<input type="checkbox"/> a. PURCHASE REFERENCE YOUR: Please furnish the following on the terms and conditions specified on both sides of this order and on the attached sheet, if any, including delivery as indicated.		<input type="checkbox"/> b. DELIVERY - Except for billing instructions on the reverse, this delivery order is subject to instructions contained on this side only of this form and is issued subject to the terms and conditions of the above-numbered contract.	
CITY Bethesda		e. STATE MD	f. ZIP CODE 20815		
ACCOUNTING AND APPROPRIATION DATA 103 - - A - 193100 - - 2570 - - M50015 - 193451 - - - - NONCOMP - - - -				10. REQUISITIONING OFFICE OCIO/DSM/Office of Acquisition Management	

1. BUSINESS CLASSIFICATION (Check appropriate box(es))			
<input checked="" type="checkbox"/> a. SMALL	<input type="checkbox"/> b. OTHER THAN SMALL	<input type="checkbox"/> c. DISADVANTAGED	<input checked="" type="checkbox"/> d. WOMEN-OWNED
2. F.O.B. POINT Destination		14. GOVERNMENT B/L NO.	15. DELIVER TO F.O.B. POINT ON OR BEFORE (Date)
13. PLACE OF		16. DISCOUNT TERMS	
INSPECTION	b. ACCEPTANCE	10 days % 20 days % 30 days % days %	

17. SCHEDULE (See reverse for Rejections)

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
SEE LINE ITEM DETAIL						

18. SHIPPING POINT		19. GROSS SHIPPING WEIGHT		20. INVOICE NO.		17(h) TOT. (Cont. pages)
21. MAIL INVOICE TO: (703) 305-8083						
a. NAME U.S. Patent and Trademark Office						17(i) GRAND TOTAL \$208,331.76
b. STREET ADDRESS (or P.O. Box) Office of Finance, Box 17						
c. CITY Washington		d. STATE DC	e. ZIP CODE 20231			

UNITED STATES OF AMERICA BY (Signature) 		23. NAME (Typed) Kate Kudrewicz	
		TITLE: CONTRACTING/ORDERING OFFICER	

ORDER FOR SUPPLIES OR SERVICES
SCHEDULE - CONTINUATION

PAGE NO.
3 of 4

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER 01/29/2003	CONTRACT NO. 50PAPT201025	ORDER NO. 56PAPT305026
-----------------------------	------------------------------	---------------------------

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
01	<p><i>This is Task Order 56-PAPT-3-05026 to Contract No. 50-PAPT-2-01025. This task order is for UNIX Operating Systems Support. The period of performance is February 1, 2003 through June 30, 2003.</i></p> <p>Reference Requisition: 193P0330055</p> <p><i>Procurement P.O.C. Kate Kudrewicz, (703) 305-8324. Program Office COTR, Tom King, (703) 305-8999. Contractor, P.O.C. Elaine Watson (703) 416-4105.</i></p>					

TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 17) ⇒ \$0.00

Contract Level Funding Summary	Document Num 56PAPT305026	Title UNIX Oper Sys Support	Page 4 of 4
-------------------------------------------	-------------------------------------	---------------------------------------	-----------------------

2003 - - A - 193100 - - 2570 - - M50015 - 193451 - - - - NONCOMP - - - -
\$208,331.76

Reference Requisition: 193P0330055

Total Funding: \$208,331.76

Labor Category	Quantity
[REDACTED]	[REDACTED]
Total	[REDACTED]

Responsibilities Matrix			
Function	Labor Category	Qty	Duties and Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

A. **Resource Summary.** The following table provides a high level summary for all labor hours, labor costs, and ODC costs for the period of February 1, 2003 – June 30, 2003:

	Hours	Cost
[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	\$208,331.76

B. **Resources by labor category.** The following table provides a detailed breakdown of labor hours and costs per labor category for the period of February 1, 2003 – June 30, 2003

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL				\$208,331.76

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

ORDER OR SUPPLIES OR SERVICES

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

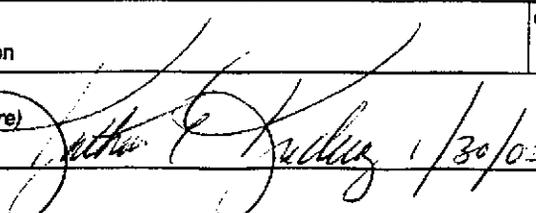
DATE OF ORDER 01/30/2003	2. CONTRACT NO. (If any) 50PAPT201025	6. SHIP TO: No Contacts Identified		
ORDER NO. 56PAPT305028	4. REQUISITION/REFERENCE NO. 193P330057	a. NAME OF CONSIGNEE		
ISSUING OFFICE (Address correspondence to) Office of Procurement U.S. Patent and Trademark Office 2011 Crystal Drive, Suite 810 Arlington VA 22202		b. STREET ADDRESS		
7. TO:		c. CITY	d. STATE	e. ZIP CODE
NAME OF CONTRACTOR Carol Trawick		f. SHIP VIA		
COMPANY NAME Trawick and Associates		8. TYPE OF ORDER		
STREET ADDRESS 6900 Wisconsin Avenue, Suite 400		<input type="checkbox"/> a. PURCHASE REFERENCE YOUR: Please furnish the following on the terms and conditions specified on both sides of this order and on the attached sheet, if any, including delivery as indicated.		
CITY Bethesda	e. STATE MD	f. ZIP CODE 20815	<input type="checkbox"/> b. DELIVERY - Except for billing instructions on the reverse, this delivery order is subject to instructions contained on this side only of this form and is issued subject to the terms and conditions of the above-numbered contract.	
ACCOUNTING AND APPROPRIATION DATA 33 - A - 193100 - - 2570 - - M50103 - 193240 - - - - NONCOMP - - - -		10. REQUISITIONING OFFICE OCIO/DelTS/Office of Customer Support Services		

BUSINESS CLASSIFICATION (Check appropriate box(es))			
<input checked="" type="checkbox"/> a. SMALL	<input type="checkbox"/> b. OTHER THAN SMALL	<input type="checkbox"/> c. DISADVANTAGED	<input checked="" type="checkbox"/> d. WOMEN-OWNED
F.O.B. POINT Destination	14. GOVERNMENT B/L NO.	15. DELIVER TO F.O.B. POINT ON OR BEFORE (Date)	16. DISCOUNT TERMS
13. PLACE OF INSPECTION	b. ACCEPTANCE		10 days % 20 days % 30 days % days %

17. SCHEDULE (See reverse for Rejections)

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
	SEE LINE ITEM DETAIL					

18. SHIPPING POINT	19. GROSS SHIPPING WEIGHT	20. INVOICE NO.	
21. MAIL INVOICE TO: (703) 305-8083			
a. NAME U.S. Patent and Trademark Office			17(h) TOT. (Cont. pages)
b. STREET ADDRESS (or P.O. Box) Office of Finance, Box 17			
c. CITY Washington	d. STATE DC	e. ZIP CODE 20231	
			\$121,322.24
			17(i) GRAND TOTAL

UNITED STATES OF AMERICA BY (Signature) 	23. NAME (Typed) Kate Kudrewicz TITLE: CONTRACTING/ORDERING OFFICER
--------------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------

ORDER FOR SUPPLIES OR SERVICES
 SCHEDULE - CONTINUATION

PAGE NO.
 3 of 4

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER 01/30/2003	CONTRACT NO. 50PAPT201025	ORDER NO. 56PAPT305028
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ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
001	<p><i>This is Task Order 56-PAPT-3-05028 to Contract No. 50-PAPT-2-01025. This task order is for Technical Writer and Document Development Support. The period of performance is February 1, 2003 through June 30, 2003.</i></p> <p>Reference Requisition: 193P330057</p> <p>Procurement P.O.C. Kate Kudrewicz, (703) 305-8324. Program Office COITR, Tom King, (703) 305-8999. Contractor P.O.C. Elaine Watson, (703) 416-4105.</p>					

TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 17i) ⇒ \$0.00

Contract Level Funding Summary	Document Number	Title	Page
	56PA, 1305028	Tech Writer TO-15	4 of 4

003 - - A - 193100 - - 2570 - - M50103 - 193240 - - - - NONCOMP - - - -
121,322.24

Reference Requisition: 193P330057

Total Funding: \$121,322.24

TECHNICAL WRITER AND DOCUMENTS DEVELOPER
TASK ORDER TO-15

CONTRACT NO.: 50-PAPT-2-01025 ORDER NO.: 56-PAPT-3-050028
EFFECTIVE DATE: February 1, 2003
REQUISITION NO.: 193P0330057

ISSUED BY: U.S. PATENT AND TRADEMARK OFFICE
OFFICE OF PROCUREMENT
BOX 6
WASHINGTON, DC 20231

ISSUED TO: TRAWICK AND ASSOCIATES
6900 WISCONSON AVENUE
SUITE 400
BETHESDA, MD 20815

ACCOUNTING AND APPROPRIATION DATA:

2003 A 193100 2570 M50103 193240 - OBLIGATE \$121,322.24

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL (NOT-TO-EXCEED) COST FOR TO-15	[REDACTED]	[REDACTED]	[REDACTED]	\$121,322.24

This task order is issued pursuant to the authority of the Contracting Officer and Special Contract Requirements, Clause H.17. TASK ORDERS PROCEDURES of the contract.

The contractor shall provide the necessary personnel and materials to accomplish this task in accordance with the statement of work, task list, and contractor work plan as approved and attached. The Contractor or any of its subcontractors shall not exceed the ceiling amount provided above in performance of this task order, without prior written approval and an executed modification to this task order.

The effective period of performance of this delivery/task order shall be from the effective date of this order through June 30, 2003, unless otherwise mutually agreed upon and properly modified by the Contracting Officer and Trawick and Associates.

Office of the Chief Information Officer FMEUS2 Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999 Jack Bowles 305-8823	Technical Writing/ Document Development (TO-15)	Peggi Gill 306-3098

1. BACKGROUND

The Communication and Information Services Division (CISD) within the Office of Customer Support Services (OCSS) is charged with the responsibility of developing, delivering and distributing informational end user documentation pertaining to Information Technology (IT). End user documentation includes user guides, announcements, bulletins, newsletters and other forms of printed and electronic material used to keep USPTO employees and contractors informed and educated concerning IT initiatives. CISD also assists with the development of internal technical writings for the OCSS Customer Support Manual, an Intranet web site containing the documentation necessary for OCSS to effectively support IT initiatives at the USPTO.

2. STATEMENT OF WORK

- A. *User Guides and Service Guides.*** Contractor shall prepare user and service guides consisting of 12 to 40 pages pertaining to the use of commercial-off-the-shelf (COTS) software and government developed software applications. The target audience for many developed publications is USPTO-wide, while other publications are developed for specific smaller target audiences. The Contractor shall develop user guides using Adobe PageMaker 6.5 or higher and Adobe Acrobat 5.0 software matching the publication specifications and technical standards established by CISD. For each user or service guide, the Contractor shall be responsible for delivering a camera-ready Adobe PageMaker 6.5 or higher document and an Adobe Acrobat 5.0 PDF format in both electronic and hard copy within three-five weeks from initial assignment. The Contractor will be required to meet with USPTO management, service providers, and end users, in determining scope, content, and procedural issues contained in each guide. The development of new guides, along with existing guides requiring revision, will be required at the approximate rate of 2 or 3 per month.
- B. *CIO News:*** CISD requires development assistance in preparing *CIO News*, an information technology newsletter produced quarterly from the Office of the Chief Information Officer (OCIO). *CIO News* is posted on the USPTO Intranet as an HTML file for all USPTO employees. Contractor support requested includes the authoring of IT and office automation articles; layout and design of each issue; and distribution of each issue using the latest version of Macromedia DreamWeaver. Each issue consists of 8-24 pages. The contractor will be required to meet with USPTO management, service providers, and end users, in determining scope and content of each issue.
- C. *Publication fulfillment and distribution services:*** CISD requires assistance in the fulfillment and distribution of publications.
1. Fulfillment services: Fulfillment services include printing, collating, folding, stapling, hole-punching, and bundling of publications developed within USPTO.

2. Distribution services: Distribution services include sorting, counting, packaging, labeling and delivering completed publications. All developed publications will require distribution services.

D. General Technical Writings: CISD requires development assistance in creating technical writings for use by OCSS personnel. The writings must adhere to OCSS standards, must be approved by an OCSS manager, and must be made available in electronic format.

3. GOVERNMENT FURNISHED MATERIAL

Contractor shall provide all hardware and software required for use in production of this task order.

4. LEVEL OF EFFORT

The government best estimate for the level of effort required to complete individual user guides and service guides is 80-120 hours each; for technical writings 4-16 hours each; for *CIO News* 60-80 hours each; and fulfillment services vary based on complexity and scope of services required. All hours are based on historical trends of producing similar publications, documents, and services performed by USPTO personnel.

This option covers the period through June 30, 2003, however the Government, reserves the right to de-scope this task order at any time. The Government will notify Contractor ten (10) working days prior to termination of the task order.

5. PLACE OF PERFORMANCE

Work shall be performed at USPTO offices.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be hand delivered to the USPTO Task Manager or, in his absence, the COTR. An electronic copy will be delivered to the COTR. Due dates are expressed as the number of business days from the task order execution date (TOED).

Deliverable		Due Date
Meeting	Introduction of staff and negotiation of work schedule	No later than TOED + 5
Progress Meeting	Preliminary progress of publication delivered electronically. (Use zip format if document exceeds 1 disk capacity).	5 business days after initial meeting
Deliverable of Final Draft	Final draft delivery of any given publication, delivered electronically and in hard copy (B&W acceptable).	Within 15 business days after initial meeting

Technical reviews will be conducted as requested by the COTR, by the USPTO Task Manager, or by the Contractor.

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task order.

8. TRAWICK RESPONSE

TO-15, February 1, 2003 – June 30, 2003 – Statement of Work for the Tech Writing/Document Development Task – FMEUS2 contract

TRAWICK proposes to perform the work specified in the above Statement of Work for the period February 1, 2003 – June 30, 2003 with the following staffing level:

<u>Labor Category</u>	<u>Quantity</u>
[REDACTED]	[REDACTED]
Total	[REDACTED]

The staffing functions will be performed as outlined in the table below.

Function	Labor Category	Qty	Duties & Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

The following provides detailed labor hour and cost estimates for the work.

- A. Resource Summary. The following table provides a high level summary of all labor hours, labor costs, and ODC costs for the period of February 1, 2003 – June 30, 2003:

	Hours	Cost
[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	\$121,322.24

- B. Resources by labor category. The following table provides a detailed breakdown of labor hours and costs per labor category for the period of February 1, 2003 – June 30, 2003:

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	[REDACTED]	[REDACTED]	\$121,322.24

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

ORDER FOR SUPPLIES OR SERVICES

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

1. DATE OF ORDER 02/07/2003		2. CONTRACT NO. (If any) 50PAPT201025		6. SHIP TO: No Contacts Identified		
3. ORDER NO. 56PAPT305030		4. REQUISITION/REFERENCE NO. 193P0330064		a. NAME OF CONSIGNEE		
5. ISSUING OFFICE (Address correspondence to) Office of Procurement U.S. Patent and Trademark Office 2011 Crystal Drive, Suite 810 Arlington VA 22202				b. STREET ADDRESS		
7. TO:		c. CITY		d. STATE	e. ZIP CODE	
NAME OF CONTRACTOR Carol Trawick		f. SHIP VIA		8. TYPE OF ORDER		
COMPANY NAME Trawick and Associates		<input type="checkbox"/> a. PURCHASE REFERENCE YOUR:		<input type="checkbox"/> b. DELIVERY - Except for billing instructions on the reverse, this delivery order is subject to instructions contained on this side only of this form and is issued subject to the terms and conditions of the above-numbered contract.		
STREET ADDRESS 6900 Wisconsin Avenue, Suite 400		Please furnish the following on the terms and conditions specified on both sides of this order and on the attached sheet, if any, including delivery as indicated.				
CITY Bethesda		e. STATE MD	f. ZIP CODE 20815	10. REQUISITIONING OFFICE OCIO/DSM/Office of Acquisition Management		
ACCOUNTING AND APPROPRIATION DATA e Funding Detail						

9. BUSINESS CLASSIFICATION (Check appropriate box(es))

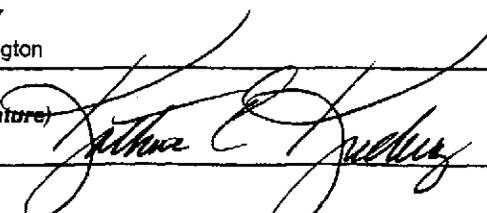
a. SMALL b. OTHER THAN SMALL c. DISADVANTAGED d. WOMEN-OWNED

11. F.O.B. POINT Destination		14. GOVERNMENT B/L NO.	15. DELIVER TO F.O.B. POINT ON OR BEFORE (Date)	16. DISCOUNT TERMS	
13. PLACE OF INSPECTION b. ACCEPTANCE				10 days	%
				30 days	%
				days	%

17. SCHEDULE (See reverse for Rejections)

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
	SEE LINE ITEM DETAIL					

18. SHIPPING POINT		19. GROSS SHIPPING WEIGHT		20. INVOICE NO.		17(h) TOT. (Cont. pages)	
21. MAIL INVOICE TO: (703) 305-8083							
SEE BILLING INSTRUCTIONS ON REVERSE	a. NAME U.S. Patent and Trademark Office					\$215,346.56	17(i) GRAND TOTAL
	b. STREET ADDRESS (or P.O. Box) Office of Finance, Box 17						
	c. CITY Washington		d. STATE DC	e. ZIP CODE 20231			

12. UNITED STATES OF AMERICA BY (Signature)  2/7/03

23. NAME (Typed)
Kate Kudrewicz
TITLE: CONTRACTING/ORDERING OFFICER

**ORDER FOR SUPPLIES OR SERVICES
SCHEDULE - CONTINUATION**

PAGE NO.
3 of 4

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER 02/07/2003	CONTRACT NO. 50PAPT201025	ORDER NO. 56PAPT305030
-----------------------------	------------------------------	---------------------------

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
101	<p><i>This is Task Order 56-PAPT-3-05030 to Contract No. 50-PAPT-2-01025. This task order is for Data Maintenance Support. The period of performance is February 18, 2003 through June 30, 2003.</i></p> <p>Reference Requisition: 193P0330064</p> <p>Procurement P.O.C. Kate Kudrewicz, (703) 305-8324. Program Office COTR, Tom King, (703) 305-8999. Contractor P.O.C. Elaine Watson, (703) 416-4105.</p>					

TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 171) ⇒ \$0.00

Contract Level Funding Summary	Document Number 56PAPT305030	Title Data Maint. Support TO-05	Page 4 of 4
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003 - - A - 193100 - - 2570 - - T50012 - 193431 - - - - NONCOMP - - - -

59,420.00

Reference Requisition: 193P0330064

003 - - A - 193100 - - 2570 - - P50012 - 193431 - - - - NONCOMP - - - -

155,926.56

Reference Requisition: 193P0330064

Total Funding: \$215,346.56

DATA MAINTENANCE SUPPORT
TASK ORDER TO-05

CONTRACT NO.: 50-PAPT-2-01025 ORDER NO.: 56-PAPT-3-05030
EFFECTIVE DATE: February 18, 2003
REQUISITION NO.: 193P0330064

ISSUED BY: U.S. PATENT AND TRADEMARK OFFICE
OFFICE OF PROCUREMENT
BOX 6
WASHINGTON, DC 20231

ISSUED TO: TRAWICK AND ASSOCIATES
6900 WISCONSON AVENUE
SUITE 400
BETHESDA, MD 20815

ACCOUNTING AND APPROPRIATION DATA:

2003 A 193100 2570 T50012 193431 - OBLIGATE [REDACTED]
2003 A 193100 2570 P50012 193431 - OBLIGATE [REDACTED]

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL (Not-to-Exceed) Cost for TO-05				\$215,346.56

This task order is issued pursuant to the authority of the Contracting Officer and Special Contract Requirements, Clause H.17. TASK ORDERS PROCEDURES of the contract.

The contractor shall provide the necessary personnel and materials to accomplish this task in accordance with the statement of work, task list, and contractor work plan as approved and attached. The Contractor or any of its subcontractors shall not exceed the ceiling amount provided above in performance of this task order, without prior written approval and an executed modification to this task order.

The effective period of performance of this delivery/task order shall be from the effective date of this order through June 30, 2003, unless otherwise mutually agreed upon and properly modified by the Contracting Officer and Trawick and Associates.

Office of the Chief Information Officer FMEUS2 Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999 Jack Bowles 305-8999	Data Maintenance Support (TO-05)	Pola Jones 305-9429

1. BACKGROUND

The primary mission of the U.S. Patent and Trademark Office (USPTO) is to issue patents and trademarks. To that end, the timely and accurate loading to and updating of a diverse number of databases is an integral part of the day-to-day operation within the USPTO Data Center, located in Two Crystal Park, 11th floor. USPTO requires a contractor staff in order to provide the data load and data load software support that will ensure that all databases are current and available to PTO's user community.

2. STATEMENT OF WORK REQUIREMENTS

As part of the requirements of the contract, the Contractor shall provide data load software support and perform multiple Patent and Trademark data loads but is not limited to the following:

I. Data Load Support

A. Weekly Issue Patent Image Data Load

The Contractor shall load the Weekly Issue Patent Image Data onto four PIRS Image Servers. The Contractor shall operate the load five days a week, 24 hours per day. This includes but is not limited to the following:

- Load Weekly Issue Patent Image Data in TIFF onto image servers.
- Update associated indices
- Record all down time
- Update error log
- Create a back-up of all data that has been successfully loaded

B. Trademark Weekly Application and Registration Image Data Loads

The Contractor shall load both Trademark application and registration cropped images from cartridges onto the X-Search server. The Contractor shall operate the load five days a week, an hour per day. This includes but is not limited to the following:

- Mount cartridge
- Execute load command

- Dismount cartridge
- Verify load status
- Record all down time
- Update error log

C. Patent Images on the Web (PIW)

The Contractor shall load all existing Weekly Issue Patent Image Data from Tagged Image File Format (TIFF) when received and placed in local image files for subsequent display on the Internet (Web). The Contractor shall operate the load on a weekly basis. This includes but is not limited to the following:

- Create a tape copy of the existing patent image data from TIFF
- Load Weekly Issue patent image data in TIFF on EMC
- Record all down time
- Transfer daily logs from POTW1 and POTW2 UNIX servers to PTOWEB1 server

D. Weekly Issue Application Image Data Load

The Contractor shall load the Weekly Issue Application Image Data onto four AIRS Image Servers. The Contractor shall operate the load five days a week, 24 hours per day. This includes but is not limited to the following:

- Load Weekly Issue Application Image Data in TIFF onto image servers.
- Update associated indices
- Record all down time
- Update error log
- Create a back-up of all data that has been successfully loaded

E. Application Images on the Web (AIW)

The Contractor shall load all existing Weekly Issue Application Image Data from Tagged Image File Format (TIFF) when received and placed in local image files for subsequent display on the Internet (Web). The Contractor shall operate the load on a weekly basis. This includes but is not limited to the following:

- Create a tape copy of the existing application image data from TIFF
- Load Weekly Issue application image data in TIFF on EMC
- Record all down time
- Transfer daily logs

F. Foreign Image Data Load

The Contractor shall load all existing Foreign Patent Image Data for both the European and Japanese Patent Offices. The Foreign Image Data shall be loaded from both cartridge and CD-Rom onto Symmetric devices as tagged image file format (TIFF) images. The Contractor shall operate the load five days a week, 24 hours per day. This includes but is not limited to the following:

- Mount CD-ROM/Cartridge
- Execute load command
- Dismount CD-ROM/Cartridge
- Verify load status
- Record all down time
- Update error log

G. Computer Search Support Text Data Load

The Contractor shall load Patent data (USPAT, EPO, JPO and Derwent text and image data), into Oracle and index into BRS/Search. The Contractor shall operate the load five days a week, 24 hours per day. This includes but is not limited to the following:

- Utilize the COTS load utilities (i.e., BRS Loads, SQL Loader) to store a copy of BRS formatted documents and USPAT Green Book formatted documents in Oracle
- Verify load status
- Record all down time
- Generate load/summary reports

H. Trademark Daily BRS-Update Monitoring Process

The Contractor shall monitor the Trademark daily BRS-Update process. The Contractor shall monitor the process five days a week, three hours per day. This includes but is not limited to the following:

- Logging into the designated server (ATLAS)
- Verify the execution of the load
- Monitoring the load process
- Verifying the load status
- Confirming the completion of the load
- Record all down time

I. Data File Delivery Update Monitoring Process

The Contractor shall monitor the Data File Delivery (DFD) Update process. The Contractor shall monitor the process weekly to confirm the execution and completion of the load process.

J. CD-Rom Reference Library System (CRLS) Update

The Contractor shall load the Weekly CRLS Updates to Server. The Contractor shall operate the load five days a week, 24 hours per day. This includes but is not limited to the following:

- Logging into the designated server (UPWS Server)
- Mount CD-Rom
- Verify the execution of the load
- Monitoring the load process
- Verifying the load status
- Confirming the completion of the load
- Record all down time

K. Pre-Exam “Pre-grant Publication” Support XML Tape Cutting Process

The Contractor shall create the Weekly Pre-Exam Pre-grant Publication XML Tape. The Contractor shall create the tape on a weekly basis. This includes but is not limited to the following:

- Logging into the designated server (NEO Server)
- Mount Tape
- Verify the execution of the tape creation process
- Monitoring the process
- Verifying the status
- Confirming the completion of the load
- Record all down time

L. EFS “Pre-grant Publication” Tape Cutting Process

The Contractor shall create the Weekly EFS Pre-Grant Publication Tape. The Contractor shall create the tape on a weekly basis. This includes but is not limited to the following:

- Logging into the designated server (Garcia Server)
- Mount Tape
- Verify the execution of the tape creation process
- Monitoring the process

- Verifying the status
- Confirming the completion of the load
- Record all down time

M. Patent Application Capture and Review System (PACR) Tape Cutting Process

The Contractor shall create the Weekly PACR Tape. The Contractor shall create the tape on a weekly basis. This includes but is not limited to the following:

- Logging into the designated server (Garcia Server)
- Mount Tape
- Verify the execution of the tape creation process
- Monitoring the process
- Verifying the status
- Confirming the completion of the load
- Record all down time

N. Automated Biotechnology Sequence Search System (ABSS) Tape Cutting Process

The Contractor shall create the Weekly ABSS Tape. The Contractor shall create the tape on a weekly basis. This includes but is not limited to the following:

- Logging into the designated server (ABSS Server)
- Mount 8mm Tape
- Verify the execution of the tape creation process
- Monitoring the process
- Verifying the status
- Confirming the completion of the load
- Record all down time

O. Publication Site for Issued and Published Sequences (PSIPS) Tape Cutting Process

The Contractor shall create the Weekly a PSIPS Tape. The Contractor shall create the tape on a weekly basis. This includes but is not limited to the following:

- Logging into the designated server (PSIPS Server)
- Mount Tape
- Verify the execution of the tape creation process
- Monitoring the process
- Verifying the status
- Confirming the completion of the load

- Record all down time

P. Query By Example (QBE) Keyword Database Weekly Update

The Contractor shall execute the Weekly QBE Keyword Update. The Contractor shall operate the load on a weekly basis. This includes but is not limited to the following:

- Logging into the designated server (Europa Server)
- Verify the execution of the load process
- Monitoring the process
- Verifying the status
- Confirming the completion of the load
- Record all down time

Q. Digital Linear Tape (DLT) Patent Grant Front-file Tape Creating Process

The Contractor shall create the DLT Patent Grant Front-file Tape. The Contractor shall create the tape(s) on a weekly basis. This includes but is not limited to the following:

- Logging into the designated server (Burrough, Bigblue, Ritchie or Kernigan Server)
- Mount Tape
- Verify the execution of the tape creation process
- Monitoring the process
- Verifying the status
- Confirming the completion of the load
- Record all down time

R. Digital Linear Tape (DLT) Pre-Grant Front-file tape Creating Process

The Contractor shall create the DLT Patent Grant Front-file Tape. The Contractor shall create the tape(s) on a weekly basis. This includes but is not limited to the following:

- Logging into the designated server (Barrett or AndyGibb)
- Mount Tape
- Verify the execution of the tape creation process
- Monitoring the process
- Verifying the status
- Confirming the completion of the load
- Record all down time

II. Data Load Software Support

The Data Maintenance Branch is an integral part of the Data Center Operations Division, which is currently not staffed to perform several data support troubleshooting and corrective processes to ensure the accuracy of the US Patent Grant and Pre-Grant Publication Text and Image databases. Contracted assistance is required for the functions performed in assuring the validity of load process, correcting errors with the text and image data loads, and ad hoc assistance when required to insure the accuracy and validity of the pertinent databases.

The Contractor shall provide the following Data Load Software Support Functions:

The contractor shall provide support in the troubleshooting of apparent software problems, investigate errors that may be causing software problems, and correct all support software problems that occur in the load processes and verify the operability of all load systems after corrections have been completed.

The contractor shall isolate and reload patent(s) that fail to process successfully through the text BRS data load process. Provide recovery of the text load due to failures.

The contractor shall isolate and reload application(s) that fail to process successfully through the text BRS data load process. Provide recovery of the text load due to failures.

The contractor shall isolate and reload patent(s) that fail to process successfully through the PIRS image load process. Provide recovery of image load due to failures.

The contractor shall isolate and reload application(s) that fail to process successfully through the AIRS image load process. Provide recovery of image load due to failures.

The contractor shall provide support of the entire load process for both the Weekly Issue Text and Image Data Load Process.

The contractor shall investigate all loads, which terminate abnormally to determine if the problem is procedural or requires a programmer to be called to solve the problem.

The contractor shall respond to ad hoc requests for analysis, special load processing, and file load support in exigent situations.

The contractor shall respond to ad hoc requests for production assistance from USPTO systems and operations personnel, or any other USPTO office as required.

The contractor shall provide support in performing, maintaining and tracking the back-ups of all text and image data that is successfully loaded.

Corrections will be made in the shortest time possible in order to resume any load that is in a "Wait State" due to software problems.

This support will be provided on a 5 days per week, 24 hours per day basis.

3. GOVERNMENT FURNISHED MATERIAL

The Government will provide access to all staff, workspace, procedures, equipment, and materials needed. The equipment and space provided, does NOT include office space nor any equipment or furniture needed by the employee(s) to perform tasks other than data loads. It refers to computer room space used to house the data load equipment and the data load equipment itself.

4. LEVEL OF EFFORT

The PTO has identified the following types of labor categories of personnel needed:

Computer Operators: At least one year of experience with NT and UNIX in a client-server operations environment. Individuals should be familiar with basic commands of both operating systems and have the ability to perform basic troubleshooting and problem resolution of jobs being run in a production environment.

Key Contact Designation: The Contractor's Staff Database Administrator on this task will be the key contact person to act as a single point of contact for investigating problems, performing the problem investigation, and accomplishing problem resolution.

This option covers the period through June 30, 2003, however the Government, reserves the right to de-scope this task order at any time. The Government will notify Contractor ten (10) working days prior to termination of the task order.

5. PLACE OF PERFORMANCE

Work will be performed in the space, which currently houses the equipment that is used to perform the data load activities which is located in the computer room of Crystal Park II, Crystal City, VA.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the COTR (electronic form preferred).

Deliverable:

Load Status Reports
Load Error Reports
Ad hoc and standardized reports

Schedule:

Weekly
Weekly
As required

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS/LCM is required under this task order.

8. TRAWICK RESPONSE

TO-05, February 18, 2003 – June 30, 2003 – Statement of Work for Data Maintenance Support Task – FMEUS2 contract

TRAWICK proposes to perform the work specified in the above Statement of Work for the period February 18, 2003 – June 30, 2003 with the following staffing level:

Labor Category	Quantity
[REDACTED]	[REDACTED]
Total	[REDACTED]

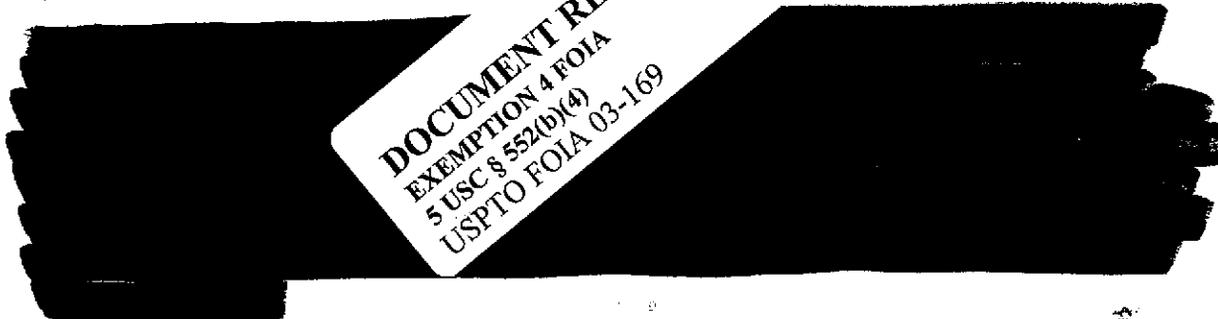
Responsibilities Matrix			
Function	Labor Category	Qty	Duties & Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

Responsibilities Matrix			
Function	Labor Category	Qty	Duties & Responsibilities
			[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

The following reflects the recommended hours for the shifts and staffing level and labor categories comprising each shift:

Shift Hours	Labor Categories	Staffing Level
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]



The following is a detailed labor hour and cost estimate for the work.

- A. **Resource Summary.** The following table provides a high level summary of all labor hours, labor costs, and ODC costs for the period of February 18, 2003 – June 30, 2003:

	Hours	Cost
[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	\$215,346.56

B. **Resources by labor category.** The following table provides a detailed breakdown of labor hours and costs per labor category for the period of February 18, 2003 – June 30, 2003:

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL				\$215,346.56

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

ORDER FOR SUPPLIES OR SERVICES

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER 02/07/2003	2. CONTRACT NO. (If any) 50PAPT201025	6. SHIP TO: No Contacts Identified		
ORDER NO. 56PAPT305031	4. REQUISITION/REFERENCE NO. 193P0330070	a. NAME OF CONSIGNEE		
ISSUING OFFICE (Address correspondence to) Office of Procurement U.S. Patent and Trademark Office 2011 Crystal Drive, Suite 810 Arlington VA 22202		b. STREET ADDRESS		
7. TO:		c. CITY	d. STATE	e. ZIP CODE
NAME OF CONTRACTOR Carol Trawick		f. SHIP VIA		
COMPANY NAME Trawick and Associates		8. TYPE OF ORDER		
STREET ADDRESS 6900 Wisconsin Avenue, Suite 400		<input type="checkbox"/> a. PURCHASE		b. DELIVERY - Except for billing instructions on the reverse, this delivery order is subject to instructions contained on this side only of this form and is issued subject to the terms and conditions of the above-numbered contract.
CITY Bethesda		REFERENCE YOUR:		
e. STATE MD		f. ZIP CODE 20815		
ACCOUNTING AND APPROPRIATION DATA 13 - - A - 193100 - - 2570 - - M50018 - 193220 - - - - NONCOMP - - - -		10. REQUISITIONING OFFICE OCIO/DeITS/Office of Customer Support Services		

BUSINESS CLASSIFICATION (Check appropriate box(es))			
<input checked="" type="checkbox"/> a. SMALL	<input type="checkbox"/> b. OTHER THAN SMALL	<input type="checkbox"/> c. DISADVANTAGED	<input checked="" type="checkbox"/> d. WOMEN-OWNED
F.O.B. POINT Destination	14. GOVERNMENT B/L NO.	15. DELIVER TO F.O.B. POINT ON OR BEFORE (Date)	16. DISCOUNT TERMS
13. PLACE OF INSPECTION	b. ACCEPTANCE		10 days % 20 days % 30 days % days %

17. SCHEDULE (See reverse for Rejections)

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
	SEE LINE ITEM DETAIL					

18. SHIPPING POINT	19. GROSS SHIPPING WEIGHT	20. INVOICE NO.	17(h) TOT. (Cont. pages)
21. MAIL INVOICE TO:(703) 305-8083			
a. NAME U.S. Patent and Trademark Office		d. STATE DC	e. ZIP CODE 20231
b. STREET ADDRESS (or P.O. Box) Office of Finance, Box 17			
c. CITY Washington			
			\$1,330,131.30
			17(f) GRAND TOTAL

UNITED STATES OF AMERICA BY (Signature) 	23. NAME (Typed) Kate Kudrewicz TITLE: CONTRACTING/ORDERING OFFICER
-----------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------

**ORDER FOR SUPPLIES OR SERVICES
SCHEDULE - CONTINUATION**

PAGE NO.
3 of 4

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER 02/07/2003	CONTRACT NO. 50PAPT201025	ORDER NO. 56PAPT305031
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ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
101	<p><i>This is Task Order No. 56-PAPT-3-05031 to Contract No. 50-PAPT-2-01025. This task order is for Help Desk Support. The period of performance is February 18, 2003 through June 30, 2003.</i></p> <p>Reference Requisition: 193P0330070</p> <p>Procurement P.O.C. Kate Kudrewicz(703) 305-8324. Program Office COTR, (703) 305-8999. Contractor P.O.C., Elaine Watson, (703) 416-4105.</p>					

TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 17I) ⇒ \$0.00

Contract Level Funding Summary	Document Number 56PAPT305031	Title Help Desk TO-09	Page 4 of 4
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2003 - - A - 193100 - - 2570 - - M50018 - 193220 - - - - NONCOMP - - - -
\$1,330,131.30

Reference Requisition: 193P0330070

Total Funding: \$1,330,131.30

Office of the Chief Information Officer FMEUS2 Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999 Jack Bowles 305-8823	Help Desk (TO-09)	Carol Eakins (Acting)

1. BACKGROUND

The OCIO Help Desk is under the direction of the Office of Customer Support Services (OCSS)/Help Desk Services Division and is the single point of contact for USPTO employees and contractors reporting problems with, or requesting services or changes involving OCIO supported hardware and software. The Help Desk ensures that all calls are handled promptly, courteously, and are resolved or sent to the proper service provider within the established time frame. The Help Desk staff must be knowledgeable with the USPTO's customer base and technical environment(s), and will be proficient in providing support for the desktop software.

Electronic Business System (EBS): The EBS Help Desk is the primary point of contact for public customers reporting problems or asking questions related to the application systems available on the USPTO web site (www.uspto.gov). The EBS Help Desk ensures that all calls are handled promptly, courteously, and are resolved or sent to the proper service provider within the established timeframe. The EBS Help Desk staff must be knowledgeable with all e-business applications available on USPTO web site and web-related technology such as HTML, viewers, and browsers and must be familiar with all reference materials related to general USPTO information regarding Patent and Trademark processes and procedures.

2. STATEMENT OF WORK

Contractor shall abide by all OCIO Task Manager Directives, Service Level Agreements (SLA), Operational Support Plans and Technical Notes and shall conform to the policies and procedures defined in the OCSS Customer Support Manual during the performance of job duties.

Work Requirements for OCIO Information Technology Help Desk

- Contractor shall provide support from 5:30 AM to 12:00 PM (midnight) local time, Monday through Friday and from 5:30 AM to 10:00 PM local time, Saturday, Sunday, and holidays (excluding Christmas Day, New Year's Day, and Thanksgiving). Contractor must ensure that on-call management support is provided as necessary for weekends and holidays.
- Contractor shall answer all incoming calls directly placed or transferred to the OCIO Help Desk (305-9000). Contractor shall maintain a daily average answer

speed of one (1) minute or less when the weekday call volume is 500 calls or less. The following average weekday answer speeds will apply to call volumes above 500:

Number of Calls	Expected Daily Answer Speed (Minutes)
501-550	1.5
551-600	2
601-650	3
651-700	4
701-800	6
801-900	9
901-1000	12
1000+	no set expectations

3. The Contractor shall properly respond to all incoming e-mail messages sent to HELPDESK 9000 using the E-Mail Response Message System or MS Outlook as the backup. Messages must receive a response within 2 hours, 95% of the time (within operational hours)
4. The contractor shall return voice mail messages left when a customer is unable to speak to a help desk agent within the time frames stipulated in the OCIO Service Commitment Statements (currently identified as thirty (30) minutes (within operational hours) 95% of the time).
5. Contractor shall use the Enterprise Asset Management System (EAMS) to thoroughly document all activity related to customer problems, service requests, or change requests – known as Problem Records (PR), Service Records (SR) or Change Records (CR) respectively. Contractor shall update the appropriate record within 15 minutes of either performing work towards resolving the request, or receiving communication from the customer, or the assignee related to that record.
6. Contractor shall mark records “Resolved” only AFTER the customer has verified that the service has been performed or the problem has been resolved to the customer’s satisfaction. An exception is made if 3 attempts to contact a customer, via both e-mail and phone, over a 3-day period do not produce a response from the customer.
7. Contractor shall be responsible for responding to and resolving problems and service records assigned to the Help Desk within the OCIO stipulated Service Commitment Statements.
8. On a daily basis, the Contractor shall review reports of problem records created during the previous twenty-four (24) hours (“*Problems Opened in Selected Date Range Sorted by Status Code*”) to ensure that records are properly assigned and

contain adequate and correct information related to the AIS field and categorization of the ticket. Additionally, the Contractor shall review at least 20% of those created records to ensure correct information is provided for more specific details to include, but not limited to customer location and phone number, correct categorization of tickets based on description of problem, correct AIS if applicable, and appropriate status information to meet OCIO SLA's. Contractor shall make appropriate corrections and take appropriate action to escalate problems that extend beyond service level commitments.

9. Contractor shall issue Critical Problem Notices (CPN) within 15 minutes of notification of a major production outages or a major loss of functionality to multiple customers. If the Help Desk is unable to contact the assignee, or there is inadequate information available to prepare a detailed CPN, a Pre-CPN Alert message must be distributed to the assignee and the CPN-Admin Group within 15 minutes and the detailed CPN must be distributed within 1 hour. Additionally, if the critical problem is generating a large volume of calls to the Help Desk, Critical Problem Instructions (CPI) must be generated and distributed to the Help Desk staff, also within the initial 15 minutes. Active CPNs must be tracked from initial release through final resolution according to standard procedures documented in the OCSS Customer Support Manual. These procedures include contacting problem assignees to obtain frequent status updates and detailed problem cause and resolution, e-mailing updates for all active CPNs and generating nightly status report for open CPNs (Monday through Friday). This nightly report is then used during the next business day's Operations Meeting and ultimately is the basis for all Root Cause Analysis reports. Contractors shall use the information in CPNs as a basis for updating the System Status Page on the intranet Web site when available. The CPN Team will provide assistance to the HDSD Manager to create various CPN reports as required by the OCIO. Initially, the CPN Team will document CPN information in a soon to be developed Access database.
10. Contractor shall provide a Technical Writer to support Help Desk documentation requirements. These requirements consist of updates to the OCSS Customer Support Manual and assistance with Knowledge Pak documentation.
11. Contractor shall contact the USPTO Public Search Rooms in Arlington, VA, Detroit, MI and Sunnyvale, CA to ensure that all systems are functioning properly and take necessary action to include ticket creation and assignee notification if any problems are reported.
12. Contractor shall identify parts (excluding mice) for Patent and Trademark Depository Library (PTDL) workstations requiring replacement within six (6) hours.
13. Contractor shall provide remote support to the two warehouses listed below:

Franconia Warehouse 6808 Loisdale Road Springfield, VA	Fullerton Center <i>(also known as the Newington Warehouse)</i> 7401 Fullerton Road Springfield, VA
--------------------------------------------------------------	--------------------------------------------------------------------------------------------------------------

This remote support shall include all of the Personal Computers and peripherals (connected to PTONet and to the Federal Records Center via modems) and PALM/TRAM equipment (connected to the Clearpath via modems) at these locations. Support shall be for both the hardware and software.

14. Contractor shall also provide remote support to the following locations:

1. RTIS Contractor
 275 Gibraltar Road
 Horsham, PA 19055
 Telephone: 215-441-6360
 POC: Brett Yeagley

2. 125 Rock Road
 Horsham, PA 19044
 Telephone: 215 441-6475
 POC: Tom Callison

This remote support shall include all of the Personal Computers and peripherals, and PALM equipment. Contractor shall provide support Monday through Friday, from 7:30 AM to 11:30 PM and weekends from 7:30 AM to 5 PM. Contractor shall notify SIRA of any problems at the Pennsylvania sites that can't be resolved remotely.

15. Contractor shall maintain a minimum 95% customer satisfaction rating at all times. This translates to Contractor receiving no more than 5% "re-opened" and "unsatisfactory" ratings. Ratings will be measured through the Customer Quality Check process. The rating levels given during the quality checks are: outstanding, very good, satisfactory, unsatisfactory and re-open.

Work Requirements for EBS:

1. Contractor shall provide support from 6:00pm to 6:00am local time, Monday through Friday. Contractor shall provide 24-hour coverage on weekends and holidays excluding Thanksgiving Day, Christmas Day, and New Years Day.

2. Contractor shall answer incoming calls placed to 800-786-9199, 703-308-4357 or 703-308-9000 regarding the USPTO's electronic business services (Option #2) and maintain an average answer speed of 1 minute or less for an average up to 50 calls per shift.

3. Contractor shall properly respond to incoming electronic correspondences (e-mails) regarding EBS technical issues sent to the General USPTO mailbox (usptoinfo@uspto.gov), using the E-Mail Response Message System. Contractor must adhere to the procedures listed in the OCSS CSM and respond using the pre-approved responses within 1 business day.
4. Contractor must provide accurate transfers and responses to other electronic business support areas to include the day shift for EBS, the Patent Electronic Business Center (PEBC), PrintTEAS and others.
5. Contractor shall use the Enterprise Asset Management System (EAMS) to thoroughly document all activity related to customer problems or inquiries. Contractor shall update the appropriate record within 15 minutes of either performing work towards resolving the problem or providing the requested information.
6. Contractor shall be responsible for responding to and resolving problems or inquiries assigned to EBS within 1 business day.
7. Contractor shall mark records "Resolved" only AFTER the customer has verified that the service has been performed or the problem has been resolved to the customer's satisfaction. An exception is made if 3 attempts to contact a customer, over a 3-day period do not produce a response from the customer.

3. GOVERNMENT FURNISHED MATERIAL

The Government shall furnish Help Desk workspace, telephone systems, problem and change management systems(s), and all pertinent reference documentation.

4. LEVEL OF EFFORT

No work will be performed under this Task Order without the written direction of the COTR. This option covers the period through June 30, 2003, however the Government, reserves the right to de-scope this task order at any time. The Government will notify Contractor ten (10) working days prior to termination of the task order.

5. PLACE OF PERFORMANCE

Work shall be performed throughout the various buildings occupied by the PTO in Crystal City, VA and in the contractor-leased facilities in Crystal City, VA, Springfield, Va., and Alexandria, VA.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the PTO COTR and Task Managers (electronic form required).

Deliverable	Schedule
-------------	----------

Problem, Service and Change records	Within fifteen (15) minutes of reported problem, change, or service
Critical Problem Notifications/Pre-CPN Alerts/Critical Problem Instructions	Within fifteen (15) minutes of a reported outage of a production system or major loss of functionality for multiple customers.
Monthly Status Report	By the 10 th of each month.

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task.

8. TRAWICK RESPONSE

TO-09, February 18, 2003 – June 30, 2003 – Statement of Work for the Helpdesk Task on the FMEUS2 contract

TRAWICK proposes to perform the work specified in the above Statement of Work for the period February 18, 2003 – June 30, 2003 with the following staffing level:

Labor Category

Quantity

[REDACTED]

[REDACTED]

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

Total

[REDACTED]

Work Requirements for OCIO Information Technology Help Desk

TRAWICK proposes a staffing level of [REDACTED] to perform responsibilities assigned to the OCIO IT sub-section of the Help Desk.

Responsibilities Matrix			
Function	Qty	Labor Category	Rationale for Staffing Level
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Responsibilities Matrix			
Function	Qty	Labor Category	Rationale for Staffing Level
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

Responsibilities Matrix			
Function	Qty	Labor Category	Rationale for Staffing Level
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

Responsibilities Matrix			
Function	Qty	Labor Category	Rationale for Staffing Level
			[REDACTED]

Support for Electronic Business Systems (EBS)

TRAWICK proposes a staffing level of [REDACTED] to handle support for public calls/e-mails in regards to PTO's Electronic Business Systems.

Responsibilities Matrix			
Function	Qty	Labor Category	Rationale for Staffing Level
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

Responsibilities Matrix			
Function	Qty	Labor Category	Rationale for Staffing Level
[REDACTED]		[REDACTED]	[REDACTED]

The following provides detailed labor hour and cost estimates for the work proposed.

- A. **Resource Summary.** The following table provides a high level summary of all labor hours, labor costs, and ODC costs for the period of February 18, 2003 – June 30, 2003.

	Hours	Cost
Labor	[REDACTED]	[REDACTED]
ODCs	[REDACTED]	[REDACTED]
TOTAL		\$1,330,131.30

- B. **Resources by labor category.** The following table provides a detailed breakdown of labor hours and costs per labor category for the period of February 18, 2003 – June 30, 2003:

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL				\$1,330,131.30

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

ORDER FOR SUPPLIES OR SERVICES

PAGE 1 OF 5 PAGES

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

1. DATE OF ORDER 02/07/2003	2. CONTRACT NO. (If any) 50PAPT201025	6. SHIP TO: No Contacts Identified		
3. ORDER NO. 56PAPT300503	4. REQUISITION/REFERENCE NO. 193P0330081	a. NAME OF CONSIGNEE		
5. ISSUING OFFICE (Address correspondence to) Office of Procurement U.S. Patent and Trademark Office 2011 Crystal Drive, Suite 810 Arlington VA 22202		b. STREET ADDRESS		
		c. CITY	d. STATE	e. ZIP CODE

7. TO: NAME OF CONTRACTOR Carol Trawick COMPANY NAME Trawick and Associates STREET ADDRESS 6900 Wisconsin Avenue, Suite 400 CITY Bethesda		f. SHIP VIA	8. TYPE OF ORDER <input type="checkbox"/> a. PURCHASE REFERENCE YOUR: Please furnish the following on the terms and conditions specified on both sides of this order and on the attached sheet, if any, including delivery as indicated.		<input type="checkbox"/> b. DELIVERY - Except for billing instructions on the reverse, this delivery order is subject to instructions contained on this side only of this form and is issued subject to the terms and conditions of the above-numbered contract.
e. STATE MD	f. ZIP CODE 20815	10. REQUISITIONING OFFICE OCIO/DSM/Office of Acquisition Management			
ACCOUNTING AND APPROPRIATION DATA 03 - - A - 193100 - - 2570 - - M50049 - 193441 - - - - NONCOMP - - - -					

9. BUSINESS CLASSIFICATION (Check appropriate box(es)) <input checked="" type="checkbox"/> a. SMALL <input type="checkbox"/> b. OTHER THAN SMALL <input type="checkbox"/> c. DISADVANTAGED <input checked="" type="checkbox"/> d. WOMEN-OWNED				
11. F.O.B. POINT Destination	13. PLACE OF INSPECTION	14. GOVERNMENT B/L NO.	15. DELIVER TO F.O.B. POINT ON OR BEFORE (Date)	16. DISCOUNT TERMS 10 days % 20 days % 30 days % days %
b. ACCEPTANCE				

17. SCHEDULE (See reverse for Rejections)

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
SEE LINE ITEM DETAIL						

18. SHIPPING POINT	19. GROSS SHIPPING WEIGHT	20. INVOICE NO.			17(h) TOT. (Cont. pages)
21. MAIL INVOICE TO: (703) 305-8083					
a. NAME U.S. Patent and Trademark Office					17(i) GRAND TOTAL \$1,591,777.82
b. STREET ADDRESS (or P.O. Box) Office of Finance, Box 17					
c. CITY Washington	d. STATE DC	e. ZIP CODE 20231			

UNITED STATES OF AMERICA BY (Signature) 	23. NAME (Typed) Kate Kudrewicz TITLE: CONTRACTING/ORDERING OFFICER
--------------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------

**ORDER FOR SUPPLIES OR SERVICES
SCHEDULE - CONTINUATION**

PAGE NO.
3 of 5

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER 02/07/2003	CONTRACT NO. 50PAPT201025	ORDER NO. 56PAPT300503
-----------------------------	------------------------------	---------------------------

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
301	<p><i>This is Task Order 56-PAPT-3-05032 to Contract No. 50-PAPT-2-01025. This task order is for Network Operations Support. The period of performance is February 18, 2003 through June 30, 2003.</i></p> <p>Reference Requisition: 193P0330081</p> <p>Procurement P.O.C. Kate Kudrewicz (703) 305-8324. Program Office P.O.C. Tom King, (703) 305-8999. Contractor, P.O.C. Elaine Watson, (703) 416-4105.</p>					

TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 171) ⇒ \$0.00

Contract Level Funding Summary	Document Numbr 56PAPT300503	Title Network Ops TO-12	Page 4 of 5
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2003 - - A - 193100 - - 2570 - - M50049 - 193441 - - - - NONCOMP - - - -
\$100,000.00

Reference Requisition: 193P0330081

2003 - - A - 193100 - - 2570 - - M50049 - 193441 - - - - NONCOMP - - - -
\$50,000.00

Reference Requisition: 193P0330081

2003 - - A - 193100 - - 2570 - - M50049 - 193441 - - - - NONCOMP - - - -
\$50,000.00

Reference Requisition: 193P0330081

2003 - - A - 193100 - - 2570 - - M50049 - 193441 - - - - NONCOMP - - - -
\$30,000.00

Reference Requisition: 193P0330081

2003 - - A - 193100 - - 2570 - - M50049 - 193441 - - - - NONCOMP - - - -
\$50,000.00

Reference Requisition: 193P0330081

2003 - - A - 193100 - - 2570 - - M50049 - 193441 - - - - NONCOMP - - - -
109,777.82

Reference Requisition: 193P0330081

Contract Level Funding Summary	Document Numbr	Title	Page
	56PAPT300503	Network Ops TO-12	5 of 5

2003 - - A - 193100 - - 2570 - - M50049 - 193441 - - - - NONCOMP - - - -
\$302,000.00

Reference Requisition: 193P0330081

2003 - - A - 193100 - - 2570 - - M50049 - 193441 - - - - NONCOMP - - - -
\$200,000.00

Reference Requisition: 193P0330081

2003 - - A - 193100 - - 2570 - - M50049 - 193441 - - - - NONCOMP - - - -
\$400,000.00

Reference Requisition: 193P0330081

2003 - - A - 193100 - - 2570 - - M50049 - 193441 - - - - NONCOMP - - - -
\$300,000.00

Reference Requisition: 193P0330081

Total Funding: \$1,591,777.82

NETWORK OPERATIONS
TASK ORDER TO-12

CONTRACT NO.: 50-PAPT-2-01025

ORDER NO.: 56-PAPT-3-05032

EFFECTIVE DATE: February 18, 2003

REQUISITION NO.: 193P0330081

ISSUED BY: U.S. PATENT AND TRADEMARK OFFICE
OFFICE OF PROCUREMENT
BOX 6
WASHINGTON, DC 20231

ISSUED TO: TRAWICK AND ASSOCIATES
6900 WISCONSON AVENUE
SUITE 400
BETHESDA, MD 20815

Item Description	Qty	Hours	Rate	Total
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
SUBTOTAL	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
SUBTOTAL	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
SUBTOTAL	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
SUBTOTAL	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

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EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
GRAND TOTAL			\$1,591,777.82

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

This task order is issued pursuant to the authority of the Contracting Officer and Special Contract Requirements, Clause H.17. TASK ORDERS PROCEDURES of the contract.

The contractor shall provide the necessary personnel and materials to accomplish this task in accordance with the statement of work, task list, and contractor work plan as approved and attached. The Contractor or any of its subcontractors shall not exceed the ceiling amount provided above in performance of this task order, without prior written approval and an executed modification to this task order.

The effective period of performance of this delivery/task order shall be from the effective date of this order through June 30, 2003, unless otherwise mutually agreed upon and properly modified by the Contracting Officer and Trawick and Associates.

Office of the Chief Information Officer FMEUS2 Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999 Jack Bowles 305-8823	Network Operations (TO-12)	Jay Chalk 305-8970

1. BACKGROUND

The United States Patent and Trademark Office (USPTO) is located in Arlington, Virginia and is geographically dispersed across an eighteen building campus. PTONet currently provides connectivity to over ten thousand (10000) nodes.

PTOnet is a Local Area Network (LAN) comprised of a Gigabit Ethernet backbone, which interconnects the buildings. The core backbone resides in USPTO's computer facility located in Crystal Park II. Each building has redundant Gigabit switches (building switches) located in the main telecommunications closet of that building that connect to the core backbone switches. Switches located in telecommunications closets on each floor are redundantly connected to each building switch. Individual nodes are attached to the switches.

PTOnet also provides several wide-area network (WAN) links, or external connections, supporting the following activities:

- Internet connectivity
- contractors supporting USPTO
- connectivity to commercial automated information systems (AISs)
- PTONet services to employees working at home (TWAH/PWAH).
- PTONet services to Patent and Trademark Dissemination Libraries (PTDLs)
- connectivity to foreign Patent offices (EPO/JPO)
- Virtual Private Network: Time and Travel Reporting (TTR), Commercial Database Access (CDA), Remote Warehouse Operation (Springfield, VA. and Horsham, PA).
- Dial-up connectivity (Mail@Home), Fax Modem, Outlook Web Mail.

PTOnet's physical transmission media is comprised of both fiber optic and copper twisted pair cable. Fiber is used to interconnect buildings and closets and to attach high-speed servers to PTONet. Copper twisted pair cable extends from the switch on each floor to individual nodes.

Several Network Operating Systems (NOSs) support USPTO's workstation and application environment providing network services, file and print services, office automation applications, e-mail, and software distribution services. These services are critical to the daily operation of USPTO.

Network Operations Division (NOD) is responsible for the operation and maintenance of USPTO's:

- LAN and WAN infrastructure
- IT Security infrastructure.
- network and office automation servers
- fiber optic and copper cable plant

NOD must support the rapid growth of the network while ensuring reliability. NOD must provide centralized operation, management, administration, installation, maintenance, and technology insertion of USPTO's network infrastructure, network and office automation servers, and cable plant.

2. STATEMENT OF WORK REQUIREMENTS

GENERAL

1. The Contractor shall provide resources with expertise in the latest network technologies employed by USPTO. The Contractor shall furnish all necessary personnel, material, technical training, equipment, services and facilities (except as otherwise provided) necessary to perform all of the requirements in the statement of work
2. The Contractor shall not make any changes, modifications, alterations, or enhancements to USPTO's infrastructure, hardware, or software without detailed change records being approved by USPTO. In addition, the Contractor shall abide by all Service Level Agreements (SLA) and Standard Operating Procedures (SOP) established by USPTO.
3. The Contractor shall create a service request record in a USPTO provided maintenance tracking system for all calls received from customers or problems identified by Trawick. The tracking systems shall serve as the central repository of information used by information systems personnel in resolving calls throughout USPTO. The Contractor shall assign the call, as appropriate, for resolution and/or action. The Contractor shall inform the customer that the service request has been resolved. The Contractor shall close out all calls in USPTO's tracking system upon problem resolution.
4. The Contractor shall adhere to Technical Notes and Standard Operating Procedures (SOPs) that detail Network Operations.
5. The Contractor shall utilize the Psion units to record all hardware changes for property management purposes and to document work performed.

6. The Contractor shall meet standards of customer satisfaction established by the USPTO. Customer satisfaction measurements measure Contractor staff attributes such as professionalism, courtesy, expertise, attitude, and helpfulness.
7. The Contractor shall perform a Root Cause Analysis (RCA), for problems that they resolve, when requested.
8. The Contractor shall provide on-site support for network infrastructure and office automation servers devices operated by Network Operations Division during USPTO production hours (excluding Thanksgiving Day, Christmas Day and New Years Day).
9. The Contractor shall provide on-call support for network infrastructure and office automation servers devices operated by Network Operations Division during USPTO non-production hours (excluding Thanksgiving Day, Christmas Day and New Years Day).
10. The Contractor shall follow established escalation procedures.
11. The Contractor shall provide personal computers for contractor staff.
12. The Contractor shall perform regularly scheduled preventive (PM) maintenance activities on NOD supported systems.
13. The Contractor shall find and accurately report all network and office automation server problems within ten (10) minutes of a failure. The Contractor shall respond via telephone within 10 minutes receipt of a call or page from the Help Desk or NOC. The contractor shall resolve ninety-five percent (95%) of all office automation server and network infrastructure problems within one (1) hour of the failure.

NETWORK OPERATIONS CENTER SUPPORT

14. The Contractor shall provide 24 hour per day, 7 day per week (24x7) Network Operations Center (NOC) monitoring and reporting (excluding Thanksgiving Day, Christmas Day and New Years Day).
15. The Contractor shall operate and maintain USPTO's Network Management System (NMS). USPTO currently utilizes HP-Openview Network Node Manager operating on HP-UX operating system to perform this function. HP Openview is based upon Simple Network Management Protocol (SNMP) and Remote Monitor (RMON) protocols. The Contractor shall provide monitoring and reporting for

all network devices managed by the NMS. The Contractor shall ensure maps on the NMS are accurate and up to date.

16. The Contractor shall perform enterprise management of USPTO automated information systems (AISs). The contractor shall use NOD's Network Management System (NMS) to perform this function. The Contractor shall work with other USPTO offices to identify events that should be monitored and modify NMS maps as necessary to successfully monitor events on those AISs. The Contractor shall respond to events and outages on those systems, by contacting the Help Desk.

NETWORK MANAGEMENT SUPPORT

The Contractor shall provide problem determination, problem resolution, and maintenance described in this document for USPTO network infrastructure devices. This includes but is not limited to hardware and software on routers, hubs, switches, encryption devices, infrastructure servers, and security devices. The Contractor shall troubleshoot network problems by responding to trouble calls, performing fault isolation and restoring service. These services shall be performed twenty-four (24) hours a day, seven (7) days a week, on-site 5:30am to 7:00pm Monday through Friday, and on-call all other times excluding Thanksgiving Day, Christmas Day, and New Years Day.

17. The Contractor shall perform regularly scheduled preventive maintenance (PM) activities on USPTO network devices.
18. The Contractor shall maintain CAD drawings of the Network, fiber optic schematics/databases, IP addresses and DNS name space databases.
19. The Contractor shall maintain and operate the IDS system and provide fine-tuning, forensics analysis, attack countermeasures and system recovery.

NETWORK AND OFFICE AUTOMATION SERVER SUPPORT

20. The Contractor shall provide problem determination, problem resolution, and maintenance as described in this document for USPTO network and office automation servers including UNIX and Windows NT servers, Microsoft Back Office suite of products, and third party

commercial off the shelf (COTS) applications that support Windows NT server. The Contractor shall troubleshoot server problems by responding to trouble calls, performing fault isolation and restoring service. These services shall be performed twenty-four (24) hours a day, seven (7) days a week, on-site 5:30am to 7:00pm Monday through Friday, and on-call all other times excluding Thanksgiving Day, Christmas Day, and New Years Day.

21. The Contractor shall perform regularly scheduled preventive maintenance (PM) activities on USPTO network and office automation servers.
22. The Contractor shall operate, maintain and upgrade as necessary USPTO's tape back up system. The Contractor shall routinely back up USPTO Network and Office Automation servers and Network Management System (NMS) servers per established standard operating procedures. The Contractor shall coordinate the periodic shipping of tapes to an offsite storage facility.
23. The Contractor shall operate, maintain and upgrade as necessary hardware, software, and connectivity associated with USPTO's Public Key Infrastructure (PKI) operating environment and shall perform related system administration functions.

NETWORK CABLING SUPPORT

24. The Contractor shall provide network cabling support Monday through Friday, from 6:30 AM to 5:00 PM and on-call support all other times excluding Thanksgiving Day, Christmas Day, and New Years Day.
25. The Contractor shall troubleshoot server problems by responding to trouble calls, performing fault isolation and restoring service.
26. When on-site support is required outside of these hours, the contractor shall follow established escalation procedures to arrive within 60 minutes of notification by the NOC.
27. The Contractor shall maintain CAD drawings of USPTO's cable plant.
28. The Contractor shall provide installation, configuration, testing, maintenance and de-installation of cabling and hardware as necessary to support increased or decreased requirements. It is anticipated 8000 installations and/or activations will occur.

29. The Contractor shall provide infrastructure installation and maintenance for the network cable plant per the time frames outlined below.

Installations of network drops (regular)	Within 15 days after receipt of request through Cable Management Branch.
Installations of network drops (priority)	As negotiated with Cable Management Branch and approved by OCIO.
Activation of network drops (5 or less)	Within 1 day after receipt of request through Cable Management Branch.
Activation of network drops (greater than 5)	Within 5 days after receipt of request through Cable Management Branch.
Activation of network drops (priority)	As negotiated with Cable Management Branch and approved by OCIO.
Deactivation of existing network drops	Within 3 days after receipt of request through Cable Management Branch.

30. The Contractor shall install, and test network cabling in accordance with policies and procedures as set by the USPTO.

31. The Contractor shall arrive on-site to resolve all fiber optic cable outages within two (2) hours of first discovery of the problem. The contractor shall resolve ninety-five percent (95%) of all fiber optic cable problems within four (4) hours of first discovery of the problem.

32. The Contractor shall arrive on-site to resolve all user network cable outages within two (2) hours of first discovery of the problem. The contractor shall resolve 95% of all user network cable outages within four (4) hours of discovery of the problem.

3. GOVERNMENT FURNISHED MATERIAL

The Government shall furnish office space, change and problem tracking system(s), all pertinent SLAs, SOPs, Psion units, Cat5e cable, parts and supplies for copper/fiber install and termination and necessary hardware and software for the performance of this task.

4. LEVEL OF EFFORT

No work will be performed under this Task Order without the written direction of the COTR. This option covers the period through June 30, 2003, however the Government, reserves the right to de-scope this task order at any time. The Government will notify Contractor ten (10) working days prior to termination of the task order.

5. PLACE OF PERFORMANCE

Work shall be performed throughout the various building occupied by the USPTO in Crystal City, VA, Springfield, Va., Bailey's Crossroads, Va., and Alexandria, Va.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the COTR (electronic form preferred).

Deliverable		Due
Report	Monthly Activity Report (details accomplishments)	Monthly
Report	Monthly Task Expenditure Report (details hours billed per individual on Network Operations Support Task)	Monthly

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task.

8. TRAWICK RESPONSE

TO-12, February 18, 2003 – June 30, 2003 – Statement of Work for the Network Operations Task – FMEUS2 contract

TRAWICK proposes to perform the work specified in the Statement of Work for the period of February 18, 2003 – June 30, 2003 with the following staffing level:

<u>Labor Category</u>	<u>Qty</u>
[REDACTED]	[REDACTED]
Total	[REDACTED]

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USPTO FOIA 03-169

Due to the change of scope in this task order, TRAWICK is reducing staff by:

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

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EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

Function	Labor Category	Org	Duties and Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

Function	Labor Category	Q6	Duties and Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

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 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

Function	Labor Category	Qty	Duties and Responsibilities

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

Function	Labor Category	Qty	Duties and Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

Function	Labor Category	Qty	Duties and Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

Function	Labor Category	Qty	Duties and Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

Function	Labor Category	Qty	Duties and Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

Function	Labor Category	O/L	Duties and Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

Function	Labor Category	Qty	Duties and Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

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 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

A. **Resource Summary.** The following table provides a high level summary of all labor hours, labor costs, and ODC costs for period of February 18, 2003 – June 30, 2003:

	HOURS	COST
[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	1,591,777.82

B. **Resources by labor category.** The following table provides a detailed breakdown of labor hours and costs per labor category for period of February 18, 2003 – June 30, 2003:

Labor Category	HOURS	COST	ODC COST
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
GRAND TOTAL	[REDACTED]	[REDACTED]	\$1,591,777.82

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 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

ORDER FOR SUPPLIES OR SERVICES

PAGE 1 OF 4 PAGES

1 4

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

1. DATE OF ORDER 02/07/2003		2. CONTRACT NO. (If any) 50PAPT201025		6. SHIP TO: No Contacts Identified	
3. ORDER NO. 56PAPT305033		4. REQUISITION/REFERENCE NO. 193P0330082		a. NAME OF CONSIGNEE	
5. ISSUING OFFICE (Address correspondence to) Office of Procurement U.S. Patent and Trademark Office 2011 Crystal Drive, Suite 810 Arlington VA 22202				b. STREET ADDRESS	
				c. CITY	e. ZIP CODE
7. TO:				f. SHIP VIA	
a. NAME OF CONTRACTOR Carol Trawick				8. TYPE OF ORDER	
b. COMPANY NAME Trawick and Associates				<input type="checkbox"/> a. PURCHASE	
c. STREET ADDRESS 6900 Wisconsin Avenue, Suite 400				REFERENCE YOUR:	
				b. DELIVERY - Except for billing instructions on the reverse, this delivery order is subject to instructions contained on this side only of this form and is issued subject to the terms and conditions of the above-numbered contract.	
d. CITY Bethesda		e. STATE MD	f. ZIP CODE 20815	Please furnish the following on the terms and conditions specified on both sides of this order and on the attached sheet, if any, including delivery as indicated.	
9. ACCOUNTING AND APPROPRIATION DATA 2003 - - A - 193100 - - 2570 - - MZPKE1 - 193300 - - - - NONCOMP - - - -				10. REQUISITIONING OFFICE PTO/ITSP0	

11. BUSINESS CLASSIFICATION (Check appropriate box(es))			
<input checked="" type="checkbox"/> a. SMALL	<input type="checkbox"/> b. OTHER THAN SMALL	<input type="checkbox"/> c. DISADVANTAGED	<input checked="" type="checkbox"/> d. WOMEN-OWNED
12. F.O.B. POINT Destination		14. GOVERNMENT B/L NO.	15. DELIVER TO F.O.B. POINT ON OR BEFORE (Date)
13. PLACE OF		16. DISCOUNT TERMS	
a. INSPECTION	b. ACCEPTANCE	10 days % 20 days % 30 days % days %	

17. SCHEDULE (See reverse for Rejections)

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
	SEE LINE ITEM DETAIL					
18. SHIPPING POINT		19. GROSS SHIPPING WEIGHT	20. INVOICE NO.			
21. MAIL INVOICE TO: (703) 305-8083						17(h) TOT. (Cont. pages)
a. NAME U.S. Patent and Trademark Office						
b. STREET ADDRESS (or P.O. Box) Office of Finance, Box 17						
c. CITY Washington		d. STATE DC	e. ZIP CODE 20231		\$88,380.80	
						17(i) GRAND TOTAL

UNITED STATES OF AMERICA BY (Signature) *Kate Kudrewicz* 2/7/03

23. NAME (Typed)
Kate Kudrewicz
TITLE: CONTRACTING/ORDERING OFFICER

**ORDER FOR SUPPLIES OR SERVICES
SCHEDULE - CONTINUATION**

PAGE NO.
3 of 4

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER 02/07/2003	CONTRACT NO. 50PAPT201025	ORDER NO. 56PAPT305033
-----------------------------	------------------------------	---------------------------

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
0001	<p><i>This is Task Order 56-PAPT-3-05033 to Contract No. 50-PAPT-2-01025. This task order is for User ID and Password Support. The period of performance is February 18, 2003 through March 31, 2003.</i></p> <p>Reference Requisition: 193P0330082</p> <p><i>Procurement P.O.C. Kate Kudrewicz (703) 305-8324. Program Office COTR, Tom King, (703) 305-8999. Contractor P.O.C. Elaine Watson (703) 416-4105.</i></p>					

TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 17i) ⇒ \$0.00

Contract Level Funding Summary	Document Nur 56PAPT305033	Title User ID and Password TO-14	Page 4 of 4
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2003 - - A - 193100 - - 2570 - - MZPKE1 - 193300 - - - - NONCOMP - - - -

\$88,380.80

Reference Requisition: 193P0330082

Total Funding: \$88,380.80

USER ID AND PASSWORD SUPPORT
TASK ORDER TO-14

CONTRACT NO.: 50-PAPT-2-01025 ORDER NO.: 56-PAPT-3-05033
EFFECTIVE DATE: February 18, 2003
REQUISITION NO.: 193P0330082

ISSUED BY: U.S. PATENT AND TRADEMARK OFFICE
OFFICE OF PROCUREMENT
BOX 6
WASHINGTON, DC 20231

ISSUED TO: TRAWICK AND ASSOCIATES
6900 WISCONSON AVENUE
SUITE 400
BETHESDA, MD 20815

ACCOUNTING AND APPROPRIATION DATA:

2003 A 193100 2570 MZPKE1 193300 - OBLIGATE \$88,380.80

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL				\$88,380.80

This task order is issued pursuant to the authority of the Contracting Officer and Special Contract Requirements, Clause H.17. TASK ORDERS PROCEDURES of the contract.

The contractor shall provide the necessary personnel and materials to accomplish this task in accordance with the statement of work, task list, and contractor work plan as approved and attached. The Contractor or any of its subcontractors shall not exceed the ceiling amount provided above in performance of this task order, without prior written approval and an executed modification to this task order.

The effective period of performance of this delivery/task order shall be from the effective date of this order through March 31, 2003, unless otherwise mutually agreed upon and properly modified by the Contracting Officer and Trawick and Associates.

Office of the Chief Information Officer FMEUS2 Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999	User ID and Password	Fred Whiteside
Jack Bowles 305-8823	Administration (TO-14)	305-6973

1. BACKGROUND

The United States Patent and Trademark Office (USPTO) is located in Arlington, Virginia and is geographically dispersed across an eighteen building campus. The PTO Information Systems Security Program ensures that PTO's data and information technology assets are adequately safeguarded. The Program is multifaceted and entails the administration of data access through the use of security software, assignment of access rules, and provision of user identifiers and passwords. The Program is guided by United States Laws, Rules, and Regulations regarding Information Systems Security and the Department of Commerce's and PTO's security policies and Rules of the Road.

The Information Technology Security Program Office (ITSPO) is responsible for the administration of all user ID's and Passwords to PTOnet Systems in addition to providing a full range of security services to the various offices within the USPTO.

2. STATEMENT OF WORK REQUIREMENTS

- (1) The Contractor shall provide resources with expertise in the latest network and security technologies employed by USPTO.
- (2) Contractor Personnel assigned to this task shall have completed a security background investigation. This background check will be performed by an external agent at the contractor's cost. The results of this background investigation will be formally presented (in writing) to the Task Manager. The Task Manager will review the results of the Background Investigation and make the final determination as to the suitability of any personnel proposed for this Task.
- (3) The Contractor shall not make any changes, modifications, alterations, or enhancements to USPTO's infrastructure, hardware, or software without detailed change records being approved by USPTO. In addition, the Contractor shall abide by all Service Level Agreements (SLA) and Standard Operating Procedures (SOP) established by USPTO.
- (4) The Contractor shall create a service request record in a USPTO provided maintenance-tracking system for all access account request received from customers. The tracking systems shall serve as the central repository of information used by information systems personnel in fulfilling requests throughout USPTO. The Contractor shall assign the call, as appropriate and when necessary, for action. The Contractor shall inform the customer that the account

request has been resolved. The Contractor shall close out all calls in USPTO's tracking system upon fulfilling the request.

- (5) The Contractor shall adhere to applicable security policy and rules, Technical Notes and Standard Operating Procedures (SOPs) that pertain to Information Systems Security at the USPTO.
- (6) The Contractor shall meet standards of customer satisfaction established by the USPTO. Customer satisfaction measurements measure Contractor staff attributes such as professionalism, courtesy, expertise, attitude, and helpfulness.
- (7) The Contractor shall provide on-site 5:30 AM to 6:00 PM, 12.5 hour per day, 5 day per week (12.5x5) Login and Password administration support to OISS (excluding Federal Holidays observed by USPTO).
- (8) The Contractor shall perform enterprise management of USPTO automated information systems (AISs) Login ID's and Passwords using the Enterprise Wide Login system (EWL). The Contractor shall respond to events and outages on EWL, contact designated individuals responsible for supporting those systems, escalate as necessary, and report on the progress of restoration. Procedures for such action are outlined in the EWL Operational Support Plan (OSP).
- (9) The Contractor shall perform a Root Cause Analysis (RCA) for EWL problems when requested by USPTO.
- (10) The Contractor shall conduct security audits as requested by USPTO.
- (11) The contractor shall fulfill ninety-five percent (95%) of the following request per the time frames outlined below.

Create new PTOnet Login ID and Password	Within 1 day after receipt of approved request by OISS
Create Mail@Home ID and have materials ready for user	Within 3 days after receipt of approved request by OISS
Create new E-mail account	Within 1 day after receipt of approved request by OISS
Create new firewall ID	Within 1 day after receipt of approved request by OISS
Create Work@Home ID and have materials ready for user	Within 3 days after receipt of approved request by OISS
Create new Office Web Access (OWA) accounts	Within 3 day after receipt of approved request by OISS
Create new Shiva, SSO/EWL, LDAP, TRR firewall, SecureRemote, PACR/ABSS firewall IDs, External Contractor, RightFax and Work@Home ID	Within 3 day after receipt of approved request by OISS
After verifying the identify of a users, create a new PKI certificate or renew an existing certificate and provide user with an identification number and authorization code.	Within 1 day after receipt of approved request by OISS
Move PTOnet logon access to a different file server	Within 3 days after receipt of request by OISS
Delete PTOnet ID, firewall ID, E-mail ID, and Mail@Home ID	Within 1 day after receipt of request by OISS
Delete Shiva, SSO/EWL, LDAP, TRR firewall, SecureRemote, PACR/ABSS firewall IDs, OWA ID, External Contractor, RightFax and Work@Home ID	Within 1 day after receipt of request by OISS
Revoke PKI certificates and recover PKI keys.	Within 3 days after receipt of request by OISS
After verifying the identify of a users, create a new PKI certificate or renew an existing certificate and provide user with an	Within 1 day after receipt of approved request by OISS

or renew an existing certificate and provide user with an identification number and authorization code.	
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3. GOVERNMENT FURNISHED MATERIAL

The Government shall furnish change and problem-tracking system(s), Enterprise Wide Login System (EWL), Exchange e-mail system, PKI Certificate system, all pertinent SLAs, SOPs, and software for the performance of this task. The acquisition of office space and equipment (compatible with PTONet) for contractor personnel, beyond the six spaces provided in section 5 below, is the responsibility of the contractor.

4. LEVEL OF EFFORT

No work shall be performed under this Task Order without the written direction of the COTR.

This task order covers the period from February 18, 2003 through March 31, 2003 however the Government, reserves the right to de-scope this task order at any time. The Government will notify Contractor ten (10) working days prior to termination of the task order.

5. PLACE OF PERFORMANCE

Work shall be performed at a location specified by the Government. This location will have provisions (both equipment and office space) for six contractors.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the COTR (MS-Word electronic form preferred).

Deliverable		Due
Report	Monthly Activity Report (details accomplishments)	Monthly
Report	Monthly Task Expenditure Report (details hours billed per individual on Network Operations Support Task)	Monthly

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task.

8. TRAWICK RESPONSE

TO-14, February 18, 2003 – March 31, 2003 – Statement of Work for the Security IDs Task – FMEUS2 contract

TRAWICK proposes to perform the work specified in the above Statement of Work for the period February 18, 2003 – March 31, 2003 with the following staffing level:

<u>Labor Category</u>	<u>Quantity</u>
[REDACTED]	[REDACTED]
TOTAL	[REDACTED]

Responsibilities Matrix			
Function	Labor Category	Qty	Duties & Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

Responsibilities Matrix			
Function	Labor Category	Qty	Duties & Responsibilities
			[REDACTED]

A. **Resource Summary.** The following table provides a high level summary of all labor hours, labor costs, and ODC costs for period February 18, 2003 – March 31, 2003:

	Hours	Cost
[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	\$88,380.80

B. **Resources by labor category.** The following table provides a detailed breakdown of labor hours and costs per labor category for period February 18, 2003 – March 31, 2003:

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	[REDACTED]	[REDACTED]	\$88,380.80

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

Line Item Summary	Document Number 56PAPT305033/0001	Title User ID and PW TO-14 Mod 1	Page 2 of 3
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FYs	Fund	Budget Org	Sub	Object Class	Sub	Program	Cost Org	Sub	Proj/Job No.	Sub	Reporting Category	
Division		Closed FYs	Cancelled Fund									

Line Item Number	Description	Delivery Date (Start date to End date)	Quantity	Unit of Issue	Unit Price	Total Cost
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This is Task Order 56-PAPT-3-05033/0001 to Contract No. 50-PAPT-2-01025. This task order is for User ID and Password Support. The period of performance is April 1, 2003 through September 30, 2003.

No Changed Line Item Fields

Previous Total: \$88,380.80
Modification Total: \$438,523.38
Grand Total: \$526,904.18

Procurement P.O.C. Kate Kudrewicz (703) 305-8324. Program Office COTR, Tom King, (703) 305-8999. Contractor P.O.C. Elaine Watson (703) 416-4105.

Contract Level Funding Summary	Document Number 56PAPT3050357001	Title User ID and PW TO-14 Mod 1	Page 3 of 3
-------------------------------------------	--------------------------------------------	--------------------------------------------	-----------------------

Funding Strip Code

2003 - - A - 193100 - - 2570 - - M50026 - 193300 - - - - NONCOMP - - - -

Change in Funded Amount

\$438,523.38

Reference Requisition: 193P0330114

USER ID AND PASSWORD SUPPORT
TASK ORDER TO-14 Mod 1

CONTRACT NO.: 50-PAPT-2-01025 ORDER NO.: 56-PAPT-3-05033/0001
 EFFECTIVE DATE: April 1, 2003
 REQUISITION NO.: 193P0330114

ISSUED BY: U.S. PATENT AND TRADEMARK OFFICE
 OFFICE OF PROCUREMENT
 BOX 6
 WASHINGTON, DC 20231

ISSUED TO: TRAWICK AND ASSOCIATES
 6900 WISCONSON AVENUE
 SUITE 400
 BETHESDA, MD 20815

ACCOUNTING AND APPROPRIATION DATA:

2003 A 193100 2570 M50026 193300 - OBLIGATE \$438,523.38

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL Not-to-exceed ceiling price for TO-14 Mod 1				\$438,523.38
Previous Total				\$ 88,380.80
New TOTAL			N/A	\$526,904.18

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

[REDACTED]

This task order is issued pursuant to the authority of the Contracting Officer and Special Contract Requirements, Clause H.17. TASK ORDERS PROCEDURES of the contract.

The contractor shall provide the necessary personnel and materials to accomplish this task in accordance with the statement of work, task list, and contractor work plan as approved and attached. The Contractor or any of its subcontractors shall not exceed the ceiling amount provided above in performance of this task order, without prior written approval and an executed modification to this task order.

The effective period of performance of this delivery/task order shall be from the effective date of this order through September 30, 2003, unless otherwise mutually agreed upon and properly modified by the Contracting Officer and Trawick and Associates.

Office of the Chief Information Officer FMEUS2 Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999 Jack Bowles 305-8823	Security Services Support Administration (TO-14)	Fred Whiteside 305-6973

1. BACKGROUND

The United States Patent and Trademark Office (USPTO) is located in Arlington, Virginia and is geographically dispersed across an eighteen building campus. The PTO Information Systems Security Program ensures that PTO's data and information technology assets are adequately safeguarded. The Program is multifaceted and entails the administration of data access through the use of security software, assignment of access rules, and provision of user identifiers and passwords. The Program is guided by United States Laws, Rules, and Regulations regarding Information Systems Security and the Department of Commerce's and PTO's security policies and Rules of the Road.

The Information Technology Security Program Office (ITSPPO) provides security through delivery of services from two Divisions. The IT Security Program Office (ITSPPO) Security Services Division (SSD) seeks contractor support in the delivery of the three primary service areas described in Section 2.

2. SCOPE

The scope of this tasking is in support of security related activities in four areas, general requirements and three specific service areas:

General Requirements – This categorizes those tasks required to support security services, which may or may not be performed in support of the three identified service areas.

Identification & Authorization (IA) – This service correlates organization roles with system / information access, creates / manages / and effects that access, and reports against IA transactions as required. It integrates with external business areas (e.g. Human Resources) to promptly respond to changes in role to implement USPTO.

Threat Notification & Response – This service integrates with the Federal Computer Incident Response Center (FedCIRC), Department of Commerce Computer Incident Response Team (DOC CIRT) to identify threats to information system confidentiality, integrity, or availability. The service must evaluate the threat, coordinate the appropriate response through USPTO change control procedures, and report remediation of threat to Department or Inspector General authorities.

Incident Management & Response – This service identifies conduits of alert (e.g. Intrusion Detection System, e-mail, phone, log audit, etc.). It also prescribes the response

procedures to successfully confirm incident, assess impact, restore service, investigate, and pursue mitigation for future risk.

2. STATEMENT OF WORK REQUIREMENTS

General Requirements

- (1) The Contractor shall provide resources with expertise in the latest network and security technologies employed by USPTO.
- (2) Contractor Personnel assigned to this task shall have completed a security background investigation. This background check will be performed by an external agent at the contractor's cost. The results of this background investigation will be formally presented (in writing) to the Task Manager. The Task Manager will review the results of the Background Investigation and make the final determination as to the suitability of any personnel proposed for this Task.
- (3) The Contractor shall not make any changes, modifications, alterations, or enhancements to USPTO's infrastructure, hardware, or software without detailed change records being approved by USPTO. In addition, the Contractor shall abide by all Service Level Agreements (SLA) and Standard Operating Procedures (SOP) established by USPTO.
- (4) The Contractor shall adhere to applicable security policy and rules, Technical Notes and Standard Operating Procedures (SOPs) that pertain to Information Systems Security at the USPTO.
- (5) The Contractor shall meet standards of customer satisfaction established by the USPTO. Customer satisfaction measurements measure Contractor staff attributes such as professionalism, courtesy, expertise, attitude, and helpfulness.

Identification & Authorization (IA)

- (1) The Contractor shall create a service request record in a USPTO provided maintenance-tracking system for all access account request received from customers. The tracking systems shall serve as the central repository of information used by information systems personnel in fulfilling requests throughout USPTO. The Contractor shall assign the call, as appropriate and when necessary, for action. The Contractor shall inform the customer that the account request has been resolved. The Contractor shall close out all calls in USPTO's tracking system upon fulfilling the request.
- (2) The Contractor shall provide on-site 5:30 AM to 6:00 PM, 12.5 hour per day, 5 day per week (12.5x5) Login and Password administration support to OISS (excluding Federal Holidays observed by USPTO).

- (3) The Contractor shall perform enterprise management of USPTO automated information systems (AISs) Login ID's and Passwords using the Enterprise Wide Login system (EWL). The Contractor shall respond to events and outages on EWL, contact designated individuals responsible for supporting those systems, escalate as necessary, and report on the progress of restoration. Procedures for such action are outlined in the EWL Operational Support Plan (OSP).
- (4) The contractor shall fulfill ninety-five percent (95%) of the following request per the time frames outlined below.

Create new PTOnet Login ID and Password	Within 1 day after receipt of approved request by OISS
Create Mail@Home ID and have materials ready for user	Within 3 days after receipt of approved request by OISS
Create new E-mail account	Within 1 day after receipt of approved request by OISS
Create new firewall ID	Within 1 day after receipt of approved request by OISS
Create Work@Home ID and have materials ready for user	Within 3 days after receipt of approved request by OISS
Create new Office Web Access (OWA) accounts	Within 3 day after receipt of approved request by OISS
SSO/EWL, LDAP, TRR firewall, SecureRemote, PACR/ABSS firewall IDs, External Contractor, RightFax and Work@Home ID Recovery/Modify PKI user profiles as required.	Within 3 day after receipt of approved request by OISS
Delete PTOnet ID, firewall ID, E-mail ID, and Mail@Home ID	Within 1 day after receipt of approved request by OISS
Delete SSO/EWL, LDAP, TRR firewall, SecureRemote, PACR/ABSS firewall IDs, OWA ID, External Contractor, RightFax and Work@Home ID	Within 1 day after receipt of request by OISS

Threat Notification & Response

- (1) The Contractor shall conduct security audits as requested by USPTO.
- (2) Monitor FedCIRC threat advisory services and relate notices to the specific state of PTO sensitivity, architecture, products, and procedures.
- (3) Initiate change requests where appropriate to mitigate threat and track until completion.
- (4) Coordinate and record threat response activities, the actions, timing, and disposition.
- (5) Initiate change requests in response to audit process results if required.

Incident Management & Response

- (1) Follow all ITSP0-SSD Incident Response Plan and procedures.
- (2) Monitor CIRT (Computer Incident Response Team) mailbox for IDS alerts to be investigated.

- (3) Communicate with the appropriate network management staff to establish block IP blocks to curtail attack pending investigation.
- (4) Coordinate incident response participants through the investigation process and assume or support Incident Response Lead responsibilities.
- (5) Maintain confidentiality of all details regarding computer incidents.
- (6) Perform investigations and forensics evidence gathering as appropriate.
- (7) Complete Incident reports in standard ITSPO-SSD format.
- (8) Archive Incident response reports in database and report incidents to FedCIRC via FedCIRC's online reporting capability.

3. GOVERNMENT FURNISHED MATERIAL

The Government shall furnish change and problem-tracking system(s), Enterprise Wide Login System (EWL), Exchange e-mail system, PKI Certificate system, all pertinent SLAs, SOPs, and software for the performance of this task. The acquisition of office space and equipment (compatible with PTOnet) for contractor personnel, beyond the six spaces provided in section 5 below, is the responsibility of the contractor.

4. LEVEL OF EFFORT

No work shall be performed under this Task Order without the written direction of the COTR.

This option covers the period from April 1 2003 through September 30, 2003 however the Government, reserves the right to de-scope this task order at any time. The Government will notify Contractor ten (10) working days prior to termination of the task order.

5. PLACE OF PERFORMANCE

Work shall be performed at a location specified by the Government. This location will have provisions (both equipment and office space) for six contractors.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the COTR (MS-Word electronic form preferred).

Deliverable		Due
Report	Monthly Activity Report (details accomplishments)	Monthly

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task order.

8. TRAWICK RESPONSE

TO-014, April 1, 2003 – September 30, 2003 – Statement of Work for the Security IDs Task – FMEUS2 contract

TRAWICK proposes to perform the work specified in the above Statement of Work for the period April 1, 2003 – September 30, 2003 with the following staffing level:

<u>Labor Category</u>	<u>Quantity</u>
[REDACTED]	[REDACTED]
TOTAL	[REDACTED]

Responsibilities Matrix			
Function	Labor Category	Qty	Duties & Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

Responsibilities Matrix			
Function	Labor Category	Qty	Duties & Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

A. **Resource Summary.** The following table provides a high level summary of all labor hours, labor costs, and ODC costs for period April 1, 2003 – September 30, 2003:

	Hours	Cost
[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	\$438,523.38

B. **Resources by labor category.** The following table provides a detailed breakdown of labor hours and costs per labor category for period April 1, 2003 – September 30, 2003:

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	[REDACTED]	[REDACTED]	\$438,523.38

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169



ORDER FOR SUPPL OR SERVICES

PAGE OF PAGES

1 7

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER 02/13/2003		2. CONTRACT NO. (If any) 50PAPT201025		6. SHIP TO:		
ORDER NO. 56PAPT305034		4. REQUISITION/REFERENCE NO. 193P0330075		a. NAME OF CONSIGNEE No Shipping Information		
ISSUING OFFICE (Address correspondence to) Office of Procurement U.S. Patent and Trademark Office 2011 Crystal Drive, Suite 810 Arlington VA 22202				b. STREET ADDRESS		
7. TO:				c. CITY		d. STATE
						e. ZIP CODE
				f. SHIP VIA		
NAME OF CONTRACTOR Caroi Trawick				8. TYPE OF ORDER		
COMPANY NAME Trawick and Associates				<input type="checkbox"/> a. PURCHASE		b. DELIVERY - Except for billing instructions on the reverse, this delivery order is subject to instructions contained on this side only of this form and is issued subject to the terms and conditions of the above-numbered contract.
STREET ADDRESS 6900 Wisconsin Avenue, Suite 400				REFERENCE YOUR:		
CITY Bethesda				e. STATE MD		
				f. ZIP CODE 20815		
ACCOUNTING AND APPROPRIATION DATA Funding Detail				10. REQUISITIONING OFFICE OCIO / OCSS / DSD		

BUSINESS CLASSIFICATION (Check appropriate box(es))

a. SMALL b. OTHER THAN SMALL c. DISADVANTAGED d. WOMEN-OWNED

F.O.B. POINT Destination	14. GOVERNMENT B/L NO.	15. DELIVER TO F.O.B. POINT ON OR BEFORE (Date)	16. DISCOUNT TERMS
13. PLACE OF INSPECTION	b. ACCEPTANCE		10 days % 20 days % 30 days % days %

17. SCHEDULE (See reverse for Rejections)

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
	SEE LINE ITEM DETAIL					

18. SHIPPING POINT	19. GROSS SHIPPING WEIGHT	20. INVOICE NO.	17(h) TOT. (Cont. pages)
21. MAIL INVOICE TO: (703) 305-8083			
a. NAME U.S. Patent and Trademark Office			17(i) GRAND TOTAL
b. STREET ADDRESS (or P.O. Box) Office of Finance, Box 17			
c. CITY Washington	d. STATE DC	e. ZIP CODE 20231	

\$1,604,563.02

UNITED STATES OF AMERICA BY (Signature) *Kate Kudrewicz* 2/13/03

23. NAME (Typed)
Kate Kudrewicz
TITLE: CONTRACTING/ORDERING OFFICER

**ORDER FOR SUPPLIES OR SERVICES
SCHEDULE - CONTINUATION**

PAGE NO.
3 of 7

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER 02/13/2003	CONTRACT NO. 50PAPT201025	ORDER NO. 56PAPT305034
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ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
001	<p><i>This is Task Order No. 56-PAPT-3-05034 to Contract No. 50-PAPT-2-01025. This task order is for Desktop Field Support. The period of performance is February 18, 2003 through June 30, 2003.</i></p> <p>Reference Requisition: 193P0330075</p> <p>Procurement P.O.C. Kate Kudrewicz (703) 305-8324. Program Office COTR, Tom King, (703) 305-8999. Contractor P.O.C. (Elaine Watson, (703) 416-4105.</p>					

TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 17i) ⇒ \$0.00

Contract Level Funding Summary	Document Number 56PAPT305034	Title DFS TO08	Page 4 of 7
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2003 - - A - 193100 - - 2570 - - P50020 - 193230 - - - - NONCOMP - - - -
\$5,100.00

Reference Requisition: 193P0330075

2003 - - A - 193100 - - 2570 - - P50023 - 193230 - - - - NONCOMP - - - -
\$37,790.00

Reference Requisition: 193P0330075

2003 - - A - 193100 - - 2570 - - P50023 - 193230 - - - - NONCOMP - - - -
29,550.00

Reference Requisition: 193P0330075

2003 - - A - 193100 - - 2570 - - TZWHC1 - 193230 - - - - NONCOMP - - - -
27,290.00

Reference Requisition: 193P0330075

2003 - - A - 193100 - - 2570 - - M50023 - 193230 - - - - NONCOMP - - - -
52,500.00

Reference Requisition: 193P0330075

2003 - - A - 193100 - - 2570 - - M50023 - 193230 - - - - NONCOMP - - - -
36,133.02

Reference Requisition: 193P0330075

Contract Level Funding Summary	Document Number 56PAPT305034	Title DFS T008	Page 5 of 7
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2003 - - A - 193100 - - 2570 - - P50023 - 193230 - - - - NONCOMP - - - -
\$224,870.00

Reference Requisition: 193P0330075

2003 - - A - 193100 - - 2570 - - LZFAC1 - 193230 - - - - NONCOMP - - - -
\$8,000.00

Reference Requisition: 193P0330075

2003 - - A - 193100 - - 2570 - - CZEEC1 - 193230 - - - - NONCOMP - - - -
\$8,000.00

Reference Requisition: 193P0330075

2003 - - A - 193100 - - 2570 - - LZACC1 - 193230 - - - - NONCOMP - - - -
\$12,000.00

Reference Requisition: 193P0330075

2003 - - A - 193100 - - 2570 - - MZAQC1 - 193230 - - - - NONCOMP - - - -
\$8,000.00

Reference Requisition: 193P0330075

2003 - - A - 193100 - - 2570 - - PZEED1 - 193230 - - - - NONCOMP - - - -
\$1,640.00

Reference Requisition: 193P0330075

Contract Level Funding Summary	Document Number	Title	Page
	56PAPT305034	DFS T008	6 of 7

2003 - - A - 193100 - - 2570 - - LZDMC1 - 193230 - - - - NONCOMP - - - -
\$12,000.00

Reference Requisition: 193P0330075

2003 - - A - 193100 - - 2570 - - LZSLC1 - 193230 - - - - NONCOMP - - - -
\$4,000.00

Reference Requisition: 193P0330075

2003 - - A - 193100 - - 2570 - - CZJRC1 - 193230 - - - - NONCOMP - - - -
12,000.00

Reference Requisition: 193P0330075

2003 - - A - 193100 - - 2570 - - CZSSC1 - 193230 - - - - NONCOMP - - - -
1,000.00

Reference Requisition: 193P0330075

2003 - - A - 193100 - - 2570 - - LZEDC1 - 193230 - - - - NONCOMP - - - -
1,000.00

Reference Requisition: 193P0330075

2003 - - A - 193100 - - 2570 - - CZFIC1 - 193230 - - - - NONCOMP - - - -
1,000.00

Reference Requisition: 193P0330075

Contract Level Funding Summary	Document Number	Title	Page
	56PAPT305034	DFS T008	7 of 7

2003 - - A - 193100 - - 2570 - - LZIAC1 - 193230 - - - - NONCOMP - - - -
\$3,600.00

Reference Requisition: 193P0330075

2003 - - A - 193100 - - 2570 - - TZCRC1 - 193230 - - - - NONCOMP - - - -
\$19,690.00

Reference Requisition: 193P0330075

003 - - A - 193100 - - 2570 - - PZTAC1 - 193230 - - - - NONCOMP - - - -
68,400.00

Reference Requisition: 193P0330075

003 - - A - 193100 - - 2570 - - PZSIC1 - 193230 - - - - NONCOMP - - - -
\$6,000.00

Reference Requisition: 193P0330075

003 - - A - 193100 - - 2570 - - PZSIC1 - 193230 - - - - NONCOMP - - - -
4,000.00

Reference Requisition: 193P0330075

Total Funding: \$1,604,563.02

The contractor shall provide the necessary personnel and materials to accomplish this task in accordance with the statement of work, task list, and contractor work plan as approved and attached. The Contractor or any of its subcontractors shall not exceed the ceiling amount provided above in performance of this task order, without prior written approval and an executed modification to this task order.

The effective period of performance of this delivery/task order shall be from the effective date of this order through June 30, 2003, unless otherwise mutually agreed upon and properly modified by the Contracting Officer and Trawick and Associates.

Office of the Chief Information Officer FMEUS2 Statement of Work		
COTR	Task Title	Task Managers
Tom King 305-8999 Jack Bowles 305-8823	Desktop Field Support (TO-08)	Long Kim Ung 305-9005 Joe Vastola 305-3650

1. BACKGROUND

This task order covers desktop field support requirements related to maintenance, repair, and upgrade, among other support functions such as documentation, process creation/maintenance and data collection/manipulation, research/analysis of the USPTO desktop and related technologies. The term desktop includes but is not limited to:

- USPTO approved desktop CPU's, approved and untested laptops / docking stations, barcode readers (BCR) and accompanying peripherals which include desktop and network printers, scanners, keyboards, monitors, scan guns and other equipment common to the PTO environment. (see 2.8 for more detail on untested laptops).
- USPTO approved desktop workstation operating systems; USPTO approved desktop COTS software and desktop AIS.
- Group printers, printer servers, and Walk-up workstations.

Period of performance for this task order is from 2/18/03 to 6/30/03.

2. STATEMENT OF WORK REQUIREMENTS

1. Contractors shall abide by all OCIO Task Manager Directives, Service Level Agreements (SLA), Operational Support Plans and Technical Notes.
2. Desktop Field Support hours shall be from 5:30 AM to 12:00 AM (Midnight) local time, Monday through Friday, and from 5:30 AM to 10:00 PM local time, Saturday, Sunday and Holidays (excluding Christmas Day, New Year's Day and Thanksgiving). Scheduled group printer daily check support occurs between 7.30AM and 6.30PM everyday (excluding Christmas Day, New Year's Day and Thanksgiving). Group printer hardware support occurs between 6AM – 6PM every business day and group printer software and server administration support occurs between 6AM – 7PM every business day.
3. Contractor shall maintain a minimum 95% customer satisfaction rating at all times. This translates to Contractor receiving no more than 5% "re-opened" and "unsatisfactory" ratings. Ratings will be measured through the Customer Quality Check process. The rating levels given during the quality checks are outstanding, very good, satisfactory, unsatisfactory and re-open.
4. Whenever working on desktop equipment, contractor shall use a grounding strap to protect the equipment from Electrostatic Discharge (ESD) damage. The grounding strap should conform to the American National Standards Institute (ANSI) standards in regard to EOS/ESD Grounding. The strap should be tested for functionality on a regular basis (daily testing is recommended). In addition to the strap, all electronic components should always be stored in enclosed anti-static bags when not being handled.
5. Any desktop, peripheral or component moved, delivered or installed into service by Contractor shall be fully functional. If replacing a desktop, peripheral or component, replacement must be

equivalent or of better performance. If the customer has data files, documents, or other files on the defective desktop hardware, Contractor shall ensure that such files (when not damaged) are transferred to the replacement computer.

6. Any desktop, peripheral or component moved, delivered or installed into service by Contractor shall be locked down as required.
7. Contractor shall report any vandalism, theft or damage to desktop equipment that they are notified of or are witnesses to, to USPTO Security and task manager immediately.
8. Contractor shall provide "best effort" support to untested laptops / docking stations. For hardware related problems, the laptop/docking station may be sent out to a third-party vendor for repair; if laptop operating system and/or drivers requested by customer are not available or not compatible, then Contractor shall provide an alternative recommendation to customer. Regardless, Contractor shall keep customer and, if necessary, task manager informed of status. Contractor shall attempt to set customer expectations at the time the ticket is serviced. Contractor shall attempt to work within the requirements of the appropriate SLA if possible.
9. Contractor shall perform a Root Cause Analysis (RCA) when requested by the Task Manager.
10. Contractor shall be responsible for resolving problems associated with the desktop. Contractor shall respond to 95% of problems within two (2) hours of receipt of problem ticket. A response is defined as speaking to the customer, leaving a voice mail message for the customer, sending an email message to the customer or leaving a work service form at the customer's site. Contractor shall resolve/circumvent 95% of problems within four (4) hours of receipt of problem ticket. These commitments apply to all problems assigned to the Contractor, unless otherwise stipulated in this Task Order (TO) or Service Level Agreements.
11. Contractor shall be responsible for monitoring, troubleshooting, and resolving all operational, hardware and software problems associated with group printers, Servers and walk-up workstations. Contractor shall resolve/circumvent group printer paper, paper jam and toner problems within one (1) hour of being notified of a possible problem. The notification may be issued as a problem ticket or by an automated printer monitoring system such as Proscan. All other Group Printer related problems handled by the Contractor shall be resolved/circumvented within two (2) hours.
12. Contractor shall be responsible for group printer system administration functions, which will include, but not be limited to, the following:
 - Re-starting Drivers
 - Upgrading to New Service Packs on request
 - Maintaining local contractor user account
 - Creating/Updating group printer server and walk up workstation baseline images
13. Contractor shall complete new installations and moves of group printers. The installation/move shall be treated as a service request and shall fall under the commitments as defined in number 14. Contractor responsibilities include, but are not limited to, the following:
 - Identifying group printer subnet and requesting static IP from NOD.
 - Requesting pre-population of Group Printer name in PTONET from NSAB
 - Adding short cut to Group Printer in APS Printers network folder
 - Requesting NOD to update HP OpenView to include Group Printer for monitoring.
 - Requesting CSC to add Group Printer to HPS Server
 - Requesting WEST administration group to add Group Printer to list of printers capable of printing from WEST.

- Updating Proscan host and proscan.hst files
 - Sending Proscan file updates to users
14. Contractor shall be responsible for completing service requests associated with the desktop. These service requests can come in the form of a service ticket and/or CPU upgrade delivery order and include but are not limited to, hardware upgrades, local software installs, group printer installs/moves, printer, scanner, BCR and other peripheral installs, etc. Contractor shall respond to 95% of service requests within one (1) business day of receipt of service ticket. A response is defined as speaking to the customer, leaving a voice mail message for the customer, sending an email message to the customer or leaving a work service form at the customer's site. Contractor shall complete 95% of service requests for fewer than 10 desktop upgrades or installs within five (5) business days of receipt of service ticket w/ the exception of local software installs which should be completed within two (2) business days. Contractor shall negotiate with customer of service requests for more than 10 desktop upgrades or installs within three (3) business days of receipt of service ticket and complete service request within timeslot agreed upon with customer.
 15. Contractor shall thoroughly document all work they perform in the appropriate problem/change record. Contractor will update problem/change record after each new status. If contractor is out in the field working on a problem/change record, they shall utilize cell phones to communicate to Contractor teammates to update problem/change records in problem/change record management system (e.g. EAMS) as soon as there is a new status.
 16. If Contractor performs a site visit and the customer is available, prior to leaving the site the contractor shall confirm with the customer their satisfaction with the work performed. This confirmation will be captured by the act of the customer signing and dating the work service form. Regardless if the customer is available during a site visit or not, the contractor shall always leave a work service form with the customer. This work service form will be accurate, legible and include the following information: an explanation of work performed during the site visit, a place where the customer can confirm the visit was satisfactory, a problem/change record number if applicable, the contractor individual(s) name who made the site visit, the contractors phone number and a POC in the event there are any questions the customer needs answered after the contractor leaves the site. One copy of the form will be left with the customer; one will be kept in the Contractor's records.
 17. Contractor shall not close or resolve any records without obtaining confirmation from the customer that the service has been performed or the problem has been resolved; an exception is made if three (3) attempts to contact a customer over a three-day period do not produce a response from the customer. In the event the customer does not have phone or email and there is a designated Point of Contact (POC), the contractor will contact the POC.
 18. Contractor shall work with the Desktop Services Division (DSD) to maintain and update all Field Support Processes. These include but are not limited to the full lifecycle of the deployment process, including scheduling, interviewing, installing, deploying and quality check processes as well as desktop maintenance and desktop move/surplus support processes. It also includes data collection/manipulation, research/analysis and the facilitation of information dissemination of the USPTO desktop and related technologies.
 19. All hardware and supplies provided under this task order must adhere to the OCIO Technical Reference Model (TRM).
 20. Contractor shall be responsible for the receipt and tracking of all hardware shipped to the Contractor's facility on behalf of the USPTO.
 21. Contractor shall use the mobile (Psion) units to record all hardware changes for asset management purposes.

22. Contractor shall pack and ship replacement hardware to the PTDL so that it will arrive within five (5) working days of the receipt of the problem ticket. Contractor shall include any necessary information regarding replacement hardware and instructions for the PTDL to pack and ship back the broken hardware. Contractor shall be responsible for packing, shipping (including charges) and tracking the equipment.
23. Contractor shall resolve problems related to the following scanners within the 4-hour commitment as defined in number ten (10). The 4-hour commitment begins at time of notification of problem. The Kodak scanners have a three-year service maintenance agreement for a four-hour turnaround time. The Contractor shall initiate all problem tickets and follow up with Kodak until completion. Kodak's phone number is 1-800-356-3253.

Kodak 3590C

SN 12023804	CD 942100	PK2 - 10 - 1005 (ETC)
SN 11998593	CD 942101	ST - 3 - 3B42
SN 12023815	CD 942117	ST - 3 - 3B42
SN 12023830	CD 942118	ST - 3 - 3B42
SN 12023826	CD 942119	ST - 3 - 3B42

24. Contractor shall resolve problems related to the following scanners within the 4-hour commitment as defined in number ten (10). The 4-hour commitment begins at time of notification of problem. The Contractor shall setup a maintenance agreement for a four-hour turnaround time with a qualified Fujitsu service provider. The Contractor shall initiate all problem tickets and follow up with service provider until completion.

Fujitsu fi-4750C

SN 000781	CD 942102	ST - 3 - 3B42
SN 000701	CD 942103	PK2 - 1 - 130/110
SN 000690	CD 942104	ST - 4 - 4D01
SN 000895	CD 942113	ST - 4 - 4D01
SN 000779	CD 942114	ST - 4 - 4D01
SN 000780	CD 942115	ST - 4 - 4D01
SN 000700	CD 942116	ST - 4 - 4D01

25. Contractor shall resolve problems and complete service requests associated with the Clearpath devices and connectivity in the North and South Tower (also previously known as TRAM lot b). The Contractor's responsibilities include but are not limited to, "TDI" box, "CPO 2000" line, wall mounted outlets, and all devices on shared signal path. Problems shall be treated as problem tickets and shall fall under the 2/4-hour commitment as defined in number ten (10). Services shall be treated as service requests and shall fall under the five (5) -business day commitments as defined in number 14.
26. Contractor shall maintain desktop hardware spare equipment including full most current desktop and approved laptop CPU's at inventory levels that ensure problems may be circumvented/resolved within four (4) hours.
27. Contractor shall maintain at least a two (2) week supply of lockdown equipment; if inventories fall below this level, adequate supply shall be ordered to eliminate risk of depleted lockdown inventory.
28. Contractor shall provide a monthly status report of work accomplished on all weekends and holidays (excluding Christmas, New Year's and Thanksgiving). The report will be due as part of the End Of Month Contract Status Report (see Weekend / Holiday Progress Status Report in the deliverables section for more details).

29. Contractor shall add paper, add toner, and clear paper jams for group printers as appropriate. Contractor shall order paper and toner and shall notify USPTO official when paper or toner is being replenished/ordered. When distributing the paper from central repositories, paper shall be unboxed paper reams and neatly stacked in-group printer offices. Empty boxes and two-day or older print jobs should be labeled as "Trash" and placed near Trash bin to ensure timely trash pickup in-group printer offices. Contractor shall vacuum printers when they are dirty to ensure print jobs are clean and readable for Examiners (e.g. when toner is spilled, etc).
30. Contractor shall perform a total of four (4) daily checks of individual group printers. These checks must be at least two (2) hours apart. The first run shall begin at or before 7.30 AM and the last run as close to 6:30 PM as possible. On weekends and holidays, the Contractor checks each printer twice between the hours of 7:30AM and 6:30PM. During the last two weekends of each fiscal quarter's "quiet time", there shall be a total of three checks per group printer. Additional reactive group printer checks, above the required daily checks, shall be done to fix problems (e.g. through the notification of an automated printer monitoring system such as Proscan or problem ticket, see requirement 11).

A check is defined as:

- Printing a test print from the Walk Up Workstation with user ID "XX," where XX is the first and last initial of the technicians name. The test print is Patent number "112233."
- Clearing jams that occur. If a jam occurs, print 3 test prints of Patent number "112233" to ensure jam will not reoccur. If jam occurs continually after clearing jam and printing test prints, contact helpdesk or dispatch team to create a problem ticket or escalate an existing problem ticket to the group printer hardware support staff.
- Completely filling paper tray if the paper falls below ½ full
- Replacing toner when this status message occurs
- Throwing out trash associated with group printer to keep group printer space organized. This includes all two-day old printed patents not collected by the customer.
- Completely, accurately and legibly filling out Group Printer log sheet, which is on printer. This includes technician initials, time of visit, time of departure, status of printer at time of departure, problem or service
- Running Proscan from the Walk Up Workstation to check statuses of other group printers in area.

31. Contractor shall perform all group printer preventative maintenance visits at or near the recommended page count / maintenance cycle as recommended by the manufacturer. Each preventative maintenance visit performed for each group printer shall be documented with an EAMS ticket. The EAMS ticket shall be opened and updated on the day of the maintenance visit. It shall include which preventative maintenance cycle was performed, the printer location and name, and the services performed and parts replaced. The group printer log sheet located on/near the printer should be completely, accurately and legibly filled out identifying the EAMS ticket and services performed.

32. Contractor shall provide on-site (as necessary, e.g. when problem ticket or service request occurs) desktop support to the two warehouses listed below:

<p>Franconia Warehouse 6808 Loisdale Road Springfield, VA Telephone: 703-924-6058 and 703-924-9382 POC: Duane Davis and Nick Massillon</p>	<p>Fullerton Center (Newington Warehouse) 7401 Fullerton Road Springfield, VA Telephone: 703-644-1700 POC: Jerry Hill</p>
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33. Contractor shall provide dedicated on-site desktop support, Monday through Friday (excluding federal holidays) from 7:00 AM to 4:00 PM for the following location:

RTIS Contractor
3443 Carlyn Springs Road
Bailey's Crossroad, VA 22041
Telephone: 703 750-9580
POC: Bill Docca

34. The Contractor shall retain customer's old hard drive after a swap for 10 business days in the event customer experiences problems that require the old hard drive to resolve (e.g. data recovery).
35. The contractor shall be responsible for the onsite maintenance and problem resolution of the Trademark Hotel Pilot. This pilot consists of five offices on one floor in the North/South Tower buildings and shall be available for use (and subsequently maintenance and problem resolution) Monday through Friday, 8:30AM to 5:00PM. During weeks in which a holiday falls, hours of operation will be 8:00AM to 6:00PM on the non-holiday days (e.g., if the holiday falls on a Monday, then Tuesday through Friday will be the non-holiday days and will be open during these hours). Each office will have a Workstation for a total of five hotel workstations. Each workstation will consist of the standard Trademark baseline and a hot swappable hard drive drawer.
36. Issues with hotel office computers shall be resolved within a two-hour period. If the contractor cannot resolve the issue within 30 minutes, then they shall replace the defective item with one that is working (i.e. hot swappable hard drive, hot swap PC, printer, monitor, etc.) in order to limit the length of time needed to work on the system to restore it to operational condition within two hours.
37. The contractor shall inspect all hotel workstations at the end of each working day (e.g. if hotel participants are in the hotel up to 5pm or 6pm on weeks with a holiday, it will be done after the participants leave) to ensure that they are in working order. For example,
 - Verify that the monitor is displaying correctly and receiving a signal from the computer
 - Restart the computer and login to ensure that the computer will boot and does login to the domain
 - Print a test page to verify that the printer is receiving data from the computer and printing successfully without any problems (i.e. paper jams, low toner, etc.).
38. The contractor shall perform preventative maintenance/upgrades weekly during non-operational times to clear up any miscellaneous files on the computer, upgrade software, and service the printer.
 - Software upgrade packages shall be installed via Software Distribution Server
 - The local printer shall be serviced to ensure that they are kept in working order.
 - Clean the local printer of any toner dust and debris
 - Clean local printer rollers
 - Print a test page from the local printer as well as the computer to ensure that the printer is working, can communicate with the computer, and obtain a page count.
 - Clean up user and miscellaneous files present on the computer system to include Temp files, Netscape Caches, Temp Internet Files, History and Forms, any downloaded/created files by the user.
 - Run SpeedDisk to defrag the hard drive

3. GOVERNMENT FURNISHED MATERIAL

Complete installation procedures (including SOPs), Clearpath device data, all software and hardware, backup space on servers, Psion units, and PTONet connections necessary to complete the installations.

4. LEVEL OF EFFORT

No work outside the scope of this Task Order will be performed without the written direction of the COTR. This option covers the period through 2/18/2003 to 6/30/2003, however the Government, reserves the right to de-scope this task order at any time. The Government will notify Contractor ten (10) working days prior to termination of the task order.

5. PLACE OF PERFORMANCE

Work shall be performed throughout the various buildings occupied by the USPTO in Crystal City, VA; Springfield, VA; and Bailey's Crossroads, VA and in the contractor-leased facilities in Crystal City and Alexandria, VA.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the USPTO COTR and Task Manager (electronic form preferred).

Deliverable		Schedule
RCA	Root Cause Analysis reports	Within two days of assignment
Group Printer Report	<p>Identify and maintain the following information about the Promark Group Printers:</p> <ul style="list-style-type: none"> • Group Printer Location (e.g. CM1 2E12) • Group Printer Name (e.g. GBKV) • Group Printer Installation Date • Group Printer IP Address (e.g. 10.207.24.77) • Monthly Group Printer page count (taken on the last day of each month and updated by the COB of the first business day of the month) • Is Group Printer connected to network drop through a splitter or not? • Is Group Printer, Walk Up Workstation and associated peripherals connected to an "orange electrical outlet?" • Is there a dedicated monitor for the Group Printer Server? • Is there a dedicated keyboard for the Group Printer Server? • Is there a dedicated mouse for the Group Printer Server? • Is there a Walk Up Workstation in Group Printer location? If so, which Group Printers can the Walk Up print to? • Service Requests and Problem Tickets per group printer name associated to Walk Up Workstation, printer hardware, and servers (e.g. failed hard drives, moves, new installations, etc.) <p>Any modifications, additions or deletions to the existing group printer environment as related to the above information should be updated on the report. The deliverable should be in a database or spreadsheet format.</p>	As necessary and sent to DSD by the 10th of each month.

Deliverable		Schedule
Group Printer Processes	<p>Document and maintain the procedures used:</p> <ul style="list-style-type: none"> • When a Group Printer Server hard drive is replaced • When a Walk Up Workstation hard drive is replaced • When a Group Printer is moved to a different subnet • When a new Group Printer is installed. • During a standard Group Printer check (e.g. one of the required checks or runs done each day). • When resolving a Group Printer error related to a paper jam. • During preventative maintenance hardware support visits, including recommended page counts and items to replace per preventative maintenance visit. <p>Video tape demonstrating "best practices" for:</p> <ul style="list-style-type: none"> • Preventative and reactive hardware support to group printers • Daily maintenance of group printers including standard group printer check <p>These procedures will be published on the Helpdesk Web Pages.</p>	As Required by DSD.
Group Printer Paper and Toner Inventory	Report in spreadsheet form of current paper and toner inventories per each group printer location. Separating inventories through different columns for inventories in locker or floor.	COB Monday, Wednesday and Friday via email to Task Manager.
Report of Hardware Replacement	<p>Report of hardware replaced during previous month including problem record number, make and model of device replaced/serviced, statement as to whether the replaced hardware was under warranty, ODC dollars spent (if applicable) and asset CD#. Categorize data by:</p> <p>(1) CPU related replacements (internal cards, drives, etc) broken up by CPUs equal to or above Pentium III 933MHZ and below Pentium III 933Mhz.</p> <p>(2) Monitors</p> <p>(3) Local Printers – Broken out by top models used at the PTO as identified by asset management database –</p> <ul style="list-style-type: none"> HP LASERJET 1200 Series HP LASERJET 1100 Series HP LASERJET6L HP LASERJET5L HP LASERJET4L HP/LASERJET4000 Series HP/LASERJET6MP HP LASERJET 2000 Series Other <p>(4) Network Printers – Broken out by top models used at the PTO as identified by asset management database –</p> <ul style="list-style-type: none"> HP/LASERJET 8000 Series 	Included in End of Monthly Report and as required by DSD

Deliverable		Schedule
	HP/LASERJET 5SI Series HP/LASERJET 4SI Series HP/LASERJET 8100 Series HP/LASERJET 3100 Series HP/LASERJET 3SI Series Other (5) Workgroup and High Performance Scanners – Broken out by top models used at the PTO as identified by asset management database – Kodak 9500 Series Kodak 500 Series Kodak 3500 Series Kodak 5500 Series Fujitsu M3000 Series Fujitsu FI4750C Series Other (only workgroup/high performance scanners, not local) (6) Group Printers – Broken out by Xerox and Ricoh components (7) Laptops (8) PDAs	
Return Merchandise Authorization Pending	List of all hardware currently pending RMA; include, delivery order number, make and model, quantity, date RMA request was sent	By fifth of each month
Return Merchandise Authorization Approved	List of all hardware approved for RMA during previous month; include, delivery order number, make and model, quantity, date RMA request was sent, date RMA approval was received, date replacement was received or is to be received	By fifth of each month
Problem and Change Records	Contractor shall fully document all customer support related activities in the appropriate problem and change records	Records updates must be made within one hour after the completion of an activity

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task order.

8. TRAWICK RESPONSE

TO-08, February 18, 2003 – June 30, 2003 – Statement of Work for the Desktop Field Support (DFS) Task – FMEUS2 contract

TRAWICK proposes to perform the work specified in the above Statement of Work for the period February 18, 2003 – June 30, 2003 with the following staffing level:

Labor Category

[REDACTED]

Total

Quantity

[REDACTED]

Responsibilities Matrix			
Function	Labor Category	Qty	Duties and Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

ORDER FOR SUPPLIES OR SERVICES

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

1. DATE OF ORDER 02/14/2003		2. CONTRACT NO. (If any) 50PAPT201025		6. SHIP TO: No Contacts Identified	
3. ORDER NO. 56PAPT305038		4. REQUISITION/REFERENCE NO. See Funding Detail		a. NAME OF CONSIGNEE	
5. ISSUING OFFICE (Address correspondence to) Office of Procurement U.S. Patent and Trademark Office 2011 Crystal Drive, Suite 810 Arlington VA 22202				b. STREET ADDRESS	
7. TO:				c. CITY	d. STATE
8. NAME OF CONTRACTOR Carol Trawick				f. SHIP VIA	
9. COMPANY NAME Trawick and Associates				8. TYPE OF ORDER	
10. STREET ADDRESS 6900 Wisconsin Avenue, Suite 400				<input type="checkbox"/> a. PURCHASE REFERENCE YOUR: Please furnish the following on the terms and conditions specified on both sides of this order and on the attached sheet, if any, including delivery as indicated.	
11. CITY Bethesda		e. STATE MD	f. ZIP CODE 20815		
12. ACCOUNTING AND APPROPRIATION DATA See Funding Detail				10. REQUISITIONING OFFICE OCIO/DeITS/Office of Customer Support Services/DSD	

1. BUSINESS CLASSIFICATION (Check appropriate box(es)) <input checked="" type="checkbox"/> a. SMALL <input type="checkbox"/> b. OTHER THAN SMALL <input type="checkbox"/> c. DISADVANTAGED <input checked="" type="checkbox"/> d. WOMEN-OWNED					
2. F.O.B. POINT Destination		14. GOVERNMENT B/L NO.	15. DELIVER TO F.O.B. POINT ON OR BEFORE (Date)	16. DISCOUNT TERMS	
13. PLACE OF INSPECTION		b. ACCEPTANCE		10 days % 20 days % 30 days % days %	

17. SCHEDULE (See reverse for Rejections)

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
	SEE LINE ITEM DETAIL					

18. SHIPPING POINT		19. GROSS SHIPPING WEIGHT		20. INVOICE NO.		17(h) TOT. (Cont. pages)
21. MAIL INVOICE TO:(703) 305-8083						
a. NAME U.S. Patent and Trademark Office						\$300,914.05
b. STREET ADDRESS (or P.O. Box) Office of Finance, Box 17						
c. CITY Washington		d. STATE DC	e. ZIP CODE 20231			

UNITED STATES OF AMERICA BY (Signature) *Kate Kudrewicz* 2/14/03

23. NAME (Typed)
Kate Kudrewicz
TITLE: CONTRACTING/ORDERING OFFICER

ORDER FOR SUPPLIES OR SERVICES
 SCHEDULE JLE - CONTINUATION

PAGE NO.
 3 of 4

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER 02/14/2003	CONTRACT NO. 50PAPT201025	ORDER NO. 56PAPT305038
-----------------------------	------------------------------	---------------------------

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
001	<p><i>This is Task Order No. 56-PAPT-3-05038 to Contract No. 50-PAPT-2-01025. This task order is for Warehouse Operations. The period of performance is February 18, 2003 through June 30, 2003.</i></p> <p>Reference Requisition: 193P0330054</p> <p><i>Procurement P.O.C. Kate Kudrewicz, (703) 305-8324. Program Office COTR, Tom King, (703) 305-8999. Contractor P.O.C. Elaine Watson, (703) 416-4105.</i></p>					

TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 171) ⇒ \$0.00

**Contract Level
Funding Summary**

Document Numr
56PAPT305038

Title
Warehouse TO-18

Page
4 of 4

2003 - - A - 193100 - - 2570 - - M50023 - 193230 - - - - NONCOMP - - - -
\$195,594.13

Reference Requisition: 193P0330054

2003 - - A - 188270 - - 2570 - - 010304 - 188270 - - - - NONCOMP - - - -
\$105,319.92

Reference Requisition: 188P0230196/0001

Total Funding: \$300,914.05

WAREHOUSE OPERATIONS
TASK ORDER TO-18

CONTRACT NO.: 50-PAPT-2-01025 ORDER NO.: 56-PAPT-3-05038
 EFFECTIVE DATE: February 18, 2003
 REQUISITION NO.: 193P0330054 AND 188p0230196/0001

ISSUED BY: U.S. PATENT AND TRADEMARK OFFICE
 OFFICE OF PROCUREMENT
 BOX 6
 WASHINGTON, DC 20231

ISSUED TO: TRAWICK AND ASSOCIATES
 6900 WISCONSON AVENUE
 SUITE 400
 BETHESDA, MD 20815

ACCOUNTING AND APPROPRIATION DATA:
2003 A 193100 2570 M50023 193230 – OBLIGATE \$ 195,594.13
2003 A 188270 2570 010304 188270 – OBLIGATE \$ 105,319.92

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL				\$228,701.20

	Hours	Cost
[REDACTED]	[REDACTED]	[REDACTED]
TOTAL Not-to-Exceed Cost for TO-18		\$300,914.05

This task order is issued pursuant to the authority of the Contracting Officer and Special Contract Requirements, Clause H.17. TASK ORDERS PROCEDURES of the contract.

The contractor shall provide the necessary personnel and materials to accomplish this task in accordance with the statement of work, task list, and contractor work plan as

approved and attached. The Contractor or any of its subcontractors shall not exceed the ceiling amount provided above in performance of this task order, without prior written approval and an executed modification to this task order.

The effective period of performance of this delivery/task order shall be from the effective date of this order through June 30, 2003, unless otherwise mutually agreed upon and properly modified by the Contracting Officer and Trawick and Associates.

Office of the Chief Information Officer FMEUS2 Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999 Jack Bowles 305- 8324	Warehouse Operations (TO-18)	Tom King 305-8999 Excess POC: Dawn Cassidy 305-4312

1. BACKGROUND

Currently, the contractor in support of the USPTO operates a warehouse in Alexandria, Virginia less than 4 miles from the USPTO complex. This warehouse is used to support a variety of different task orders. The following are some of the uses of the warehouse:

- Shipping and receiving for desktop equipment (including CPUs, monitors, printers, etc)
- Processing point for property management purposes and for all delivered desktop equipment;
- Return Merchandise Authorization (RMA) request processing point for all defective equipment;
- Processing of excess equipment;
- Delivery of equipment to the USPTO campus for installation; and
- Removal of equipment from the USPTO campus for excessing.

In addition to warehouse tasks, the USPTO Data Center requires full-time, on-site contractor support services in the area of server inventory (both hardware and software), asset management and shipping and receiving to ensure that the USPTO meets and or exceeds in accomplishing its mission is essential.

2. STATEMENT OF WORK REQUIREMENTS

1. The contractor shall abide by all OCIO Task Manager Directives, Service Level Agreements (SLA), Operational Support Plans and Technical Notes.
2. The contractor shall provide support from 6:30 AM to 4:30 PM, Monday through Friday (excluding Thanksgiving, Christmas, and New Year's).
3. The contractor shall thoroughly document all work they perform in the appropriate problem/change record. Contractor shall update the record within two (2) hours of performing the work.
4. The warehouse shall be the single point of entry for all IT related assets.
5. The contractor shall scan all new equipment delivered to the warehouse within two (2) working days from date of receipt (ex. if delivery occurs on Monday, all assets must be scanned by COB Wednesday).

6. The contractor shall scan all assets brought to the warehouse to CFGS000100132 for excess immediately. All CPUs will be scanned to a CFGE skid within five (5) working days and all non-CPU items will be scanned to a CFGE skid within two (2) working days. Prior to processing the skid, the hard drives for each CPU will be sanitized according to DoD Standard 5220.22 M standards and each element will be redefined for entry into the database. Surplus skids will be completed with ninety-nine percent (99%) accuracy or the incorrect skids will be redone at no cost to the government.
7. The contractor shall ensure the use of both the Delivery Order (DO) and CD numbers in all databases used.
8. Contractor shall send the list of recently delivered hardware to the government within four (4) hours of receipt of the hardware at the warehouse.
9. The contractor shall scan all Returned Merchandise Authorization (RMA) assets brought to the warehouse to CFGS000100131 within one (1) working day.
10. Contractor shall enter all asset information into the Enterprise Asset Management System (EAMS). EAMS tickets as necessary with the problem. EAMS shall be used to produce required deliverables when applicable.
11. The contractor shall perform an informal inventory certification once a quarter.
12. The contractor shall support the government in a formal certification as requested.
13. The contractor shall follow ISO certified procedures for all aspects of the warehouse operations.

3. GOVERNMENT FURNISHED MATERIAL

The Government shall furnish hand-held Psion units and all pertinent documentation.

4. LEVEL OF EFFORT

No work will be performed under this Task Order without the written direction of the COTR. This option covers the period through June 30, 2003, however the Government, reserves the right to de-scope this task order at any time. The Government will notify Contractor ten (10) working days prior to termination of the task order.

5. PLACE OF PERFORMANCE

Work shall be performed throughout the various buildings occupied by the USPTO in Crystal City, VA; Franconia/Springfield, VA; and Newington, VA and in the contractor-leased facilities in Crystal City and Alexandria, VA.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the USPTO COTR and Task Manager (electronic form preferred).

Deliverable		Due
Return Merchandise Authorization (RMA) Report	The report will have two (2) parts. Part I must include information pertaining to parts returned to the manufacturer. This includes: the DO#, the part being returned, the reason for the return, and, when applicable, the CD bar code label number. Part II must include all RMAs returned to the USPTO and their disposition (spare pool, returned to user, etc.).	COB Friday
Spare Pool Report	The report shall include change record number, customer business area (OCIO, Patents, Trademarks,	1st working day of each month
Warehouse delivery report	Report should include: DO #, customer POC (name and phone number), type/make/model and quantity of hardware, person requesting delivery	Within four (4) hours of receipt of the hardware at the warehouse
Warehouse contents report	Report should include: DO #, customer POC (name and phone number), type/make/model and quantity of hardware, date of receipt	By COB each day
Excess Skid Report	Report should include the skid number (i.e., CFGE), date skid is initiated (i.e., scanned), date skid is certified, location, date shipped, security seal number, and remarks.	Weekly
Assets Boxes for Excess (For those assets no longer inventoried such as mice, keyboards, modems, etc.)	Report should include the skid number (i.e., CFGE), box number, description and quantity of contents, date skid is initiated (i.e., scanned), location, date shipped, security seal number, and remarks.	By COB each Monday
Shelf Life Report	List of all warehouse items and their shelf life.	By COB each Monday
Customized Reports	As defined by customer	As requested

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task.

8. TRAWICK RESPONSE

TO-18, February 18, 2003 – June 30, 2003 –Statement of Work for the Warehouse Task on the FMEUS 2 contract



The following is the proposed staffing level for the task:

Labor Category	Quantity
[REDACTED]	[REDACTED]
Total	[REDACTED]

The warehouse functions being performed and the corresponding staffing level and rationale are reflected in the following table:

Responsibilities Matrix			
Function	Labor Category	Qty	Duties and Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

Responsibilities Matrix			
Function	Labor Category	Qty	Duties and Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

[REDACTED]

A. Resource Summary. The following table provides a high level summary of all labor hours, labor costs, and ODC costs for the period of February 18, 2003 – June 30, 2003:

	Hours	Cost
[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	\$300,914.05

B. Resources by labor category. The following table provides a detailed breakdown of labor hours and costs per labor category for the period of February 18, 2003 – June 30, 2003:

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	[REDACTED]	[REDACTED]	\$228,701.20

ORDER FOR SUPPLIES OR SERVICES

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

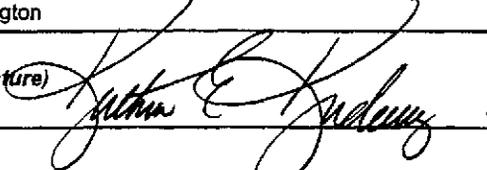
1. DATE OF ORDER 02/20/2003		2. CONTRACT NO. (If any) 50PAPT201025		6. SHIP TO: No Contacts Identified	
3. ORDER NO. 56PAPT305039		4. REQUISITION/REFERENCE NO. 192P0330092		a. NAME OF CONSIGNEE	
5. ISSUING OFFICE (Address correspondence to) Office of Procurement U.S. Patent and Trademark Office 2011 Crystal Drive, Suite 810 Arlington VA 22202				b. STREET ADDRESS	
7. TO:		c. CITY		d. STATE	e. ZIP CODE
. NAME OF CONTRACTOR Carol Trawick				f. SHIP VIA	
. COMPANY NAME Trawick and Associates				8. TYPE OF ORDER	
. STREET ADDRESS 6900 Wisconsin Avenue, Suite 400				<input type="checkbox"/> a. PURCHASE <input type="checkbox"/> b. DELIVERY - Except for billing instructions on the reverse, this delivery order is subject to instructions contained on this side only of this form and is issued subject to the terms and conditions of the above-numbered contract.	
. CITY Bethesda		e. STATE MD	f. ZIP CODE 20815	REFERENCE YOUR: Please furnish the following on the terms and conditions specified on both sides of this order and on the attached sheet, if any, including delivery as indicated.	
. ACCOUNTING AND APPROPRIATION DATA see Funding Detail				10. REQUISITIONING OFFICE OCIO/DSM/Office of Acquisition Management	

1. BUSINESS CLASSIFICATION (Check appropriate box(es))			
<input checked="" type="checkbox"/> a. SMALL	<input type="checkbox"/> b. OTHER THAN SMALL	<input type="checkbox"/> c. DISADVANTAGED	<input checked="" type="checkbox"/> d. WOMEN-OWNED
2. F.O.B. POINT Destination		14. GOVERNMENT B/L NO.	15. DELIVER TO F.O.B. POINT ON OR BEFORE (Date)
13. PLACE OF INSPECTION		b. ACCEPTANCE	16. DISCOUNT TERMS
			10 days % 20 days % 30 days % days %

17. SCHEDULE (See reverse for Rejections)

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
	SEE LINE ITEM DETAIL					

18. SHIPPING POINT		19. GROSS SHIPPING WEIGHT		20. INVOICE NO.	
21. MAIL INVOICE TO: (703) 305-8083					
17(h) TOT. (Cont. pages)					
17(i) GRAND TOTAL \$43,806.88					

UNITED STATES OF AMERICA BY (Signature) 			23. NAME (Typed) Kate Kudrewicz TITLE: CONTRACTING/ORDERING OFFICER		
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**ORDER FOR SUPPLIES OR SERVICES
SCHEDULE - CONTINUATION**

PAGE NO.
3 of 4

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER 02/20/2003	CONTRACT NO. 50PAPT201025	ORDER NO. 56PAPT305039
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ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
001	<p><i>This is Task Order 56-PAPT-3-05039 to Contract No. 50-PAPT-2-01025. This task order is for Server Upgrades and Peripheral Support. The period of performance is February 20, 2003 through June 30, 2003.</i></p> <p>Reference Requisition: 192P0330092</p> <p><i>Procurement P.O.C. Kate Kudrewicz, (703) 305-8324. Program Office COTR, (703) 305-8999. Contractor P.O.C. Elaine Watson, (703) 416-4105.</i></p>					

TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 171) ⇒ \$0.00

Contract Level Funding Summary	Document Number	Title	Page
	56PAPT305039	Server Upgrades TO-20	4 of 4

2003 - - A - 192100 - - 2571 - - PZLTC1 - 192221 - - - - NONCOMP - - - -
\$10,000.00

Reference Requisition: 192P0330092

2003 - - A - 192100 - - 2571 - - PZXFC1 - 192221 - - - - NONCOMP - - - -
\$10,000.00

Reference Requisition: 192P0330092

2003 - - A - 192100 - - 2571 - - PZTCC1 - 192221 - - - - NONCOMP - - - -
\$10,000.00

Reference Requisition: 192P0330092

2003 - - A - 192100 - - 2571 - - TZISC1 - 192221 - - - - NONCOMP - - - -
\$5,006.88

Reference Requisition: 192P0330092

2003 - - A - 192100 - - 2571 - - D50003 - 192221 - - - - NONCOMP - - - -
\$5,000.00

Reference Requisition: 192P0330092

2003 - - A - 192100 - - 2571 - - MZBUC1 - 192221 - - - - NONCOMP - - - -
\$3,800.00

Reference Requisition: 192P0330092

Total Funding: \$43,806.88

SERVER UPGRADES AND PERIPHERALS
TASK ORDER TO-20

CONTRACT NO.: 50-PAPT-2-01025
EFFECTIVE DATE: February 20, 2003
REQUISITION NO.: 192P0330092

ORDER NO.: 56-PAPT-3-05039

ISSUED BY: U.S. PATENT AND TRADEMARK OFFICE
OFFICE OF PROCUREMENT
BOX 6
WASHINGTON, DC 20231

ISSUED TO: TRAWICK AND ASSOCIATES
6900 WISCONSIN AVENUE
SUITE 400
BETHESDA, MD 20815

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

	Hours	Cost
[REDACTED]	[REDACTED]	[REDACTED]
TOTAL Not-to-exceed Cost for TO-20	[REDACTED]	\$43,806.88

This task order is issued pursuant to the authority of the Contracting Officer and Special Contract Requirements, Clause H.17. TASK ORDERS PROCEDURES of the contract.

The contractor shall provide the necessary personnel and materials to accomplish this task in accordance with the statement of work, task list, and contractor work plan as approved and attached. The Contractor or any of its subcontractors shall not exceed the ceiling amount provided above in performance of this task order, without prior written approval and an executed modification to this task order.

The effective period of performance of this delivery/task order shall be from the effective date of this order through June 30, 2003, unless otherwise mutually agreed upon and properly modified by the Contracting Officer and Trawick and Associates.

Office of the Chief Information Officer FMEUS2 Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999 Jack Bowles 305-8324	Server Upgrades and Peripherals TO-20	Dave Smith, 308-5120 Installation POC: Al Kellogg 308-7354

1. BACKGROUND

The USPTO operates a Data Center and a development environment (ETC Lab) in the Crystal Park 2 building in Arlington. An extended ETC Lab facility is operated in Crystal Park 5. The Data Center houses over one hundred and fifty (150) Unix servers and over three hundred and fifty (350) Microsoft Windows servers. The ETC Lab contains more than fifty (50) Unix servers and one hundred (100) Microsoft Windows servers. The following list contains some of the upgrades and changes required to operate the Data Center and ETC Lab:

- Install fibre channel or SCSI cards to connect servers to EMC storage or other storage peripherals;
- Deinstall cards from one server and reinstall the cards in another server to support the migration of an AIS from one server to another;
- Rerack servers as additional servers and peripherals are received or retired;
- Install local RAID arrays for increased storage capacity for a server;
- Install local tape drives for server backup and recovery; and
- Remove cards from a server before excess.

Most hardware upgrade and maintenance tasks in the ETC Lab can be scheduled during the regular Principal Period of Maintenance (PPM). Installations and upgrades for production Data Center servers must be performed during scheduled maintenance periods outside of production hours (10:00 PM to 6:00 AM, or on weekends).

2. STATEMENT OF WORK REQUIREMENTS

1. The Contractor shall abide by all OCIO Task Manager Directives, Service Level Agreements (SLA), Operational Support Plans and Technical Notes.
2. The Contractor shall provide support for PPM. PPM is defined as follows: between 6:00 AM and 6:00 PM, Monday through Friday (excluding Thanksgiving, Christmas, and New Year's). The Contractor shall also provide Outside Principal Period of Maintenance (OPPM) support. OPPM is defined as follows: between 6:00 PM and 6:00 AM Monday through Friday, weekends, and holidays (excluding Thanksgiving, Christmas, and New Year's).
3. The Contractor shall thoroughly document all work performed in the appropriate problem/change record utilizing the current USPTO problem/change management system. The Contractor shall update all records within eight (8) hours of performing the work.

4. The Contractor will adhere to all USPTO rules and guidelines concerning asset management as well as any ETC or computer room specific rules regarding the handling of assets.
5. The Contractor shall install hardware components as directed by the USPTO Task Manager. Installation schedules shall be coordinated with the installation POC.
6. The Contractor shall perform the appropriate tests to ensure all installed hardware is functioning correctly

3. GOVERNMENT FURNISHED MATERIAL

The Government shall furnish hardware components to be installed and all pertinent documentation.

4. LEVEL OF EFFORT

No work outside the scope of this Task Order will be performed without the written direction of the COTR.

This task order covers the period ending June 30, 2003.

5. PLACE OF PERFORMANCE

Work shall be performed throughout the various buildings occupied by the USPTO in Crystal City, VA; Franconia/Springfield, VA; and Newington, VA and in the contractor-leased facilities in Crystal City and Alexandria, VA.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the USPTO COTR and Task Manager (electronic form preferred).

Deliverable		Due
Hardware Installation Report	The report will describe the hardware that was installed and any problems encountered.	COB the business day following the installation
Customized Reports	As defined by customer	As requested

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task.

8. TRAWICK RESPONSE

TO-20 February 20, 2003 to June 30, 2003 Statement of Work for Server Upgrades and Peripherals – FMEUS2 contract.

[REDACTED]

Other Direct Costs:

[REDACTED]

[REDACTED]

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

A. **Resource Summary.** The following table provides a high level summary of all labor hours, labor costs, and ODC costs for period February 20, 2003 to June 30, 2003.

	Hours	Cost
[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	\$43,806.88

ORDER FOR SUPPLIES OR SERVICES

PAGE 1 OF 5 PAGES

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

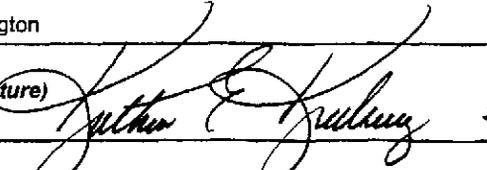
DATE OF ORDER 03/13/2003	2. CONTRACT NO. (If any) 50PAPT201025	6. SHIP TO: No Contacts Identified		
ORDER NO. 56PAPT305044	4. REQUISITION/REFERENCE NO. See Funding Detail	a. NAME OF CONSIGNEE		
ISSUING OFFICE (Address correspondence to) Office of Procurement U.S. Patent and Trademark Office 2011 Crystal Drive, Suite 810 Arlington VA 22202		b. STREET ADDRESS		
7. TO:		c. CITY	d. STATE	e. ZIP CODE
NAME OF CONTRACTOR Carol Trawick		f. SHIP VIA		
COMPANY NAME Trawick and Associates		8. TYPE OF ORDER		
STREET ADDRESS 6900 Wisconsin Avenue, Suite 400		<input type="checkbox"/> a. PURCHASE <input type="checkbox"/> b. DELIVERY - Except for billing instructions on the reverse, this delivery order is subject to instructions contained on this side only of this form and is issued subject to the terms and conditions of the above-numbered contract.		
CITY Bethesda	e. STATE MD	f. ZIP CODE 20815		
ACCOUNTING AND APPROPRIATION DATA Funding Detail		10. REQUISITIONING OFFICE OCIO/DSM/Office of Acquisition Management		

BUSINESS CLASSIFICATION (Check appropriate box(es))			
<input checked="" type="checkbox"/> a. SMALL	<input type="checkbox"/> b. OTHER THAN SMALL	<input type="checkbox"/> c. DISADVANTAGED	<input checked="" type="checkbox"/> d. WOMEN-OWNED
F.O.B. POINT Destination	14. GOVERNMENT B/L NO.	15. DELIVER TO F.O.B. POINT ON OR BEFORE (Date)	16. DISCOUNT TERMS
13. PLACE OF INSPECTION	b. ACCEPTANCE		10 days % 20 days % 30 days % days %

17. SCHEDULE (See reverse for Rejections)

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
SEE LINE ITEM DETAIL						

18. SHIPPING POINT	19. GROSS SHIPPING WEIGHT	20. INVOICE NO.		17(h) TOT. (Cont. pages)
21. MAIL INVOICE TO: (703) 305-8083				
a. NAME U.S. Patent and Trademark Office				17(i) GRAND TOTAL \$830,046.16
b. STREET ADDRESS (or P.O. Box) Office of Finance, Box 17				
c. CITY Washington	d. STATE DC	e. ZIP CODE 20231		

UNITED STATES OF AMERICA BY (Signature) 	23. NAME (Typed) Kate Kudrewicz TITLE: CONTRACTING/ORDERING OFFICER
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**ORDER FOR SUPPLIES OR SERVICES
SCHEDULE - CONTINUATION**

PAGE NO.
3 of 5

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER 03/13/2003	CONTRACT NO. 50PAPT201025	ORDER NO. 56PAPT305044
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ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
001	<p><i>This is Task Order 56-PAPT-3-05044 to Contract No. 50-PAPT-2-01025. This task order is for Database Administration Support. See attached for task order details. The period of performance is March 1, 2003 - September 30, 2003.</i></p> <p>Reference Requisition: 192P0330098</p> <p>Procurement P.O.C. Kate Kudrewicz, (703) 305-8324. Program Office COTR, Tom King, (703) 305-8999. Contractor P.O.C. Elaine Watson (703) 416-4105.</p>					

TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 17I) ⇒ \$0.00

Contract Level Funding Summary	Document Number	Title	Page
	56PAPT305044	DBA Support TO-06	4 of 5

2003 - - A - 192100 - - 2570 - - PZLTC1 - 192221 - - - - NONCOMP - - - -
\$100,000.00

Reference Requisition: 192P0330098

2003 - - A - 192100 - - 2570 - - DZAH1 - 192221 - - - - NONCOMP - - - -
\$25,000.00

Reference Requisition: 192P0330098

2003 - - A - 192100 - - 2570 - - TZT2C1 - 192221 - - - - NONCOMP - - - -
\$25,000.00

Reference Requisition: 192P0330098

2003 - - A - 192100 - - 2570 - - MZSWC1 - 192221 - - - - NONCOMP - - - -
\$112,500.00

Reference Requisition: 192P0330098

2003 - - A - 192100 - - 2511 - - D50044 - 192410 - - - - NONCOMP - - - -
\$31,680.00

Reference Requisition: 192P0330094

2003 - - A - 192100 - - 2511 - - M50044 - 192410 - - - - NONCOMP - - - -
\$183,750.00

Reference Requisition: 192P0330094

Contract Level Funding Summary	Document Number	Title	Page
	56PAPT305044	DBA Support TO-06	5 of 5

2003 - - A - 192100 - - 2511 - - P50044 - 192410 - - - - NONCOMP - - - -
\$257,076.16

Reference Requisition: 192P0330094

2003 - - A - 192100 - - 2511 - - T50044 - 192410 - - - - NONCOMP - - - -
\$50,690.00

Reference Requisition: 192P0330094

2003 - - A - 192100 - - 2511 - - C50044 - 192410 - - - - NONCOMP - - - -
\$44,350.00

Reference Requisition: 192P0330094

Total Funding: \$830,046.16

DATABASE ADMINISTRATION SUPPORT
TASK ORDER TO-06

CONTRACT NO.: 50-PAPT-2-01025 ORDER NO.: 56-PAPT-3-05044
EFFECTIVE DATE: March 1, 2003
REQUISITION NO.: 192P0330094 and 192P0330098

ISSUED BY: U.S. PATENT AND TRADEMARK OFFICE
OFFICE OF PROCUREMENT
BOX 6
WASHINGTON, DC 20231

ISSUED TO: TRAWICK AND ASSOCIATES
6900 WISCONSON AVENUE
SUITE 400
BETHESDA, MD 20815

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL (Not-To-Exceed) Cost for TO-06	[REDACTED]	[REDACTED]	[REDACTED]	\$830,046.16

This task order is issued pursuant to the authority of the Contracting Officer and Special Contract Requirements, Clause H.17. TASK ORDERS PROCEDURES of the contract.

The contractor shall provide the necessary personnel and materials to accomplish this task in accordance with the statement of work, task list, and contractor work plan as approved and attached. The Contractor or any of its subcontractors shall not exceed the ceiling amount provided above in performance of this task order, without prior written approval and an executed modification to this task order.

The effective period of performance of this delivery/task order shall be from the effective date of this order through September 30, 2003, unless otherwise mutually agreed upon and properly modified by the Contracting Officer and Trawick and Associates.

Office of the Chief Information Officer FMEUS2 Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999 Jack Bowles 305-8823	DBA and EMC Support (TO-06)	Tai-Lin Mu 305-7993 Patricia Hackman 305-9402 Jeff Baer 305-4557 (Storage)

1. BACKGROUND

The Data Base Administration Division (DBAD), Office of Data Architecture and Services, provides maintenance for the Oracle and OpenText BRS full text database environments currently running on EMC disk. At present, the USPTO is undergoing radical changes involving server, disk and database consolidation, while improving availability and recovery capabilities.

The labor requested under this task order requires ongoing support in the areas of Oracle and BRS system software maintenance, Oracle database administration, and automation of database services within the Oracle Enterprise Manager (OEM) and EMC Control Center (ECC) for Oracle databases. It requires writing scripts to automate and improve maintenance of all BRS databases in a highly volatile and changing environment.

The objective of this task is to augment current staff by providing Oracle and BRS database support to DBAD along with EMC expertise and support.

Staffing for this task order will also support the Office of Technology Architecture and Engineering (OTAES) in a joint effort with the DBAD organization. The role of OTAES & DBAD will be to jointly consolidate databases and database servers. This consolidation must be methodical and carried out with a great deal of precision to prevent any outages to the USPTO customer.

2. STATEMENT OF WORK

1. The Contractor shall provide technical services to monitor and maintain the Oracle and BRS production and test databases running on HP-UX and HP-NT servers and EMC disk. These tasks include and are not limited to: maintaining the uptime requirements of each database as documented in Operational Support Plans; backup disk space monitoring and allocation; Oracle and EMC backup execution monitoring; software installation, integration and testing of Oracle, server and EMC scripts; software upgrades to the Oracle and BRS software; and all integration and migration components to exploit the EMC and Oracle capabilities, installation of patches, password administration and media and software defect recoveries.

The Contractor must cover all shifts managed by the task order for the full duration of the shift, one hundred (100) percent of the time. At a minimum, the

Contractor must provide support from 6PM to 6AM Monday through Friday and twenty-four (24) hours on the weekend and all Federal holidays.

A face-to-face or phone turnover to another DBA, either Contractor or USPTO, is required **one hundred (100) percent** of the time when a production database is down, even if it requires extending a shift.

All shifts must have an experienced fully privileged DBA on site or on call and capable of supporting any junior personnel by phone.

Contractor DBA while on site **must be reachable one hundred (100) percent** of the time. When leaving the DBA central monitor facility, the Contractor shall carry a portable phone so that they can be reached in all monitoring locations and computer rooms. Calls from the central monitoring facility must be forwarded to that portable phone if only one (1) person covers the shift and they are required to leave the facility. The portable phone must be shared so that multiple numbers do not have to be posted with the Help Desk.

Contractor Server/Storage will work with the OTAES and DBAD organizations to:

- Plan and migrate Oracle databases to SAN attached storage.
- Plan and migrate Oracle databases from application servers to clustered Oracle servers with multiple Oracle instances residing in the same cluster. These Oracle clusters will run on Intel or Unix hardware and leverage the Oracle 9i RAC (Real Application Cluster) capabilities to allow the USPTO to provide a scalable and highly available database and server infrastructure to the USPTO. Prior successful experience and expertise with Oracle 9i RAC and database migration are critical skills for this staff.

2. The Contractor shall maintain operational readiness of all Oracle and BRS databases operating during the shifts managed by the task order while conducting maintenance, consolidation and migration activities and must plan and schedule any and all necessary outages for approval in the Change Management System, known as the Enterprise Asset Management System (EAMS).

The Contractor shall maintain up time requirements for all production Oracle and BRS databases without any additional or specific written or oral requests to that effect. Production hours are documented in the Operational Support Plan but may be altered due to special work, delays from backups or problems.

The Contractor shall respond to e-mail alert, alarm or problem notification messages generated by USPTO systems within five (5) minutes with an e-mail acknowledging the notification. Included in that e-mail must be:

- an initial assessment of the situation,
- action to be taken or a recommended course of action if full DBA privileges have not yet been granted and are needed, and
- the system log messages showing the results of any actions taken.

The e-mail shall be sent to the appropriate USPTO DBA and copied to the Task Order Managers and the Division Manager.

The Contractor shall restore operations or take first remedial action within five (5) minutes of alert from Oracle Enterprise Manager or monitoring program for a senior DBA or ECC and within five (5) minutes of approval for a junior level DBA. Included in that e-mail shall be:

- an account of actions taken,
- the status of each of the steps, and
- the system log messages showing the results of the actions taken.

The e-mail shall be sent to the appropriate USPTO DBA and copied to the Task Order Managers and the Division Manager.

The Contractor shall respond to backup failure e-mail within five (5) minutes with an e-mail acknowledging the notification. Included in that e-mail shall be:

- an initial assessment of the situation,
- action to be taken or a recommended course of action if full DBA privileges are needed, and
- the system log messages showing the results of any actions taken.

The e-mail shall be sent to the appropriate PTO DBA and copied to the Task Order Managers and the Division Manager.

The Contractor will provide staff with expertise in high availability server deployments and database migrations and consolidation. These personnel will have the technical depth and ability to understand database, server, storage and application requirements. They will work with DBAD, OTAES, and the development organizations to develop precise database, server, and storage consolidation and migration plans. They will then manage and be technically involved with the execution of those plans.

3. The Contractor shall participate with the USPTO in the maintenance and improvement of our standards of practice within the Oracle and BRS database environments and improve the management, maintenance and availability for the Oracle production and/or test environments at the USPTO. The Contractor must be able to demonstrate skill with the Oracle Enterprise Manger (OEM) version 9 and must incorporate all Oracle maintenance and management programs, scripts or actions to resolve alerts in Oracle Enterprise Manager. The Contractor must be able to demonstrate skill with the EMC Control Center and be able to respond to and potentially resolve disk related alerts and service requests that may be impacting database availability and to support migration or consolidation efforts. This is a continuous effort.

The Contractor will attend meetings with OTAES and DBAD to understand database, server, storage consolidation activities, plans and sequencing. The USPTO Task Order Managers must approve all activities and changes. All production changes will be reviewed and presented to the Change Control Board for approval.

4. The Contractor shall provide technical support and troubleshooting assistance for the application developers. This support may involve answering questions on Oracle and EMC interfaces, and or identifying production anomalies to developers for their corrective actions. This task is a continuous effort.

All requests assigned by the USPTO DBA, Task Order Managers, Help Desk, alarms, alerts or readiness anomalies, as well as requests for developer assistance shall be logged into a master request log as an on-going duty. The Contractor may elect the recording method and other content of the master request log.

One hundred (100) percent of all requests shall be included in the weekly report along with an updated status for longer-term tasks, and logged into a master action log.

All tasks shall be logged into a master completion log, and verified by the USPTO task manager or their representative as completed.

The Contractor staffing provided for the OTAES consolidation and high availability projects will not only plan and manage, but will also provide technical expertise to demonstrate and test consolidation plans in a lab, and then participate in the execution of the consolidation or migration plan in the production environment (which will occur during an approved weekend maintenance schedule).

5. The Contractor shall be responsible for coding, testing and implementing any new program products, processes and scripts used to automate operational activities such as file reorganization, space management, migration, consolidation and resolutions to system alarms. The Task Order Manager or DBAD Manager will approve test procedures, and new and revised documentation. The programming services shall include, but not be limited to, the following:
 - Analysis of the requirements,
 - Development of the coding specification and detailed design,
 - Development of programs, libraries, and/or scripts,
 - Development of test scripts and data (an USPTO DBA shall assist in this parallel testing),
 - Development of the installation plan and implementation of all processes and procedures, and
 - Development of documentation of the procedures and methodology applicable to the proper maintenance of the program(s).
6. The Contractor shall document operational procedures to completely describe any new processes and procedures. The Contractor shall log, schedule and track all changes in the Change Management System. The Contractor or a member of the computer operations staff shall log all problems resulting from any new processes and procedures in the Problem Management System.

The Contractor will place calls to Oracle premium support, open a TAR, convey specifics of the incident and work to a satisfactory solution. The Contractor will have to make intelligent decisions about the solutions Oracle may provide for a particular incident. These decisions are made based on previous experience and knowing the database environment. In many cases, a call to Oracle support can be avoided by using Oracle's online support tool, Metalink. The ability to use this tool requires a level of expertise. The search criteria can be manipulated many ways to find the solution to a particular problem. If the Contractor cannot resolve an issue, such as those identified below, they will escalate the issue to the EMC/Oracle Joint Service Center (JSC). The JSC will provide evaluation and diagnosis of the following: interoperability or data integrity issues, and performance issues in the interoperability space, and advice (proactively and reactively) to support the Contractor working on issues.

The Contractor shall escalate problems to the JSC for the following Severity 1 or Severity 2 issues that involve one or more of the following:

1. Interoperability or perceived interoperability issues such as:
 - Slow I/O or Hung I/O performance issues;
 - Connectivity issues;
 - RMAN issues; and
 - Backup issues.
2. Data Integrity Issues
 - Data corruption; and
 - Double check sum.

All new procedures and scripts must be documented and stored in an USPTO shared storage device within seven (7) calendar days of initial testing.

Documentation must be approved by the USPTO one hundred (100) percent of the time prior to implementation.

Changes to documentation must occur within one (1) day of the approved change.

A report summarizing key elements of the execution history of the Oracle backup jobs must be completed daily and prior to the end of the shift.

Shift reports must include database up time statistics, a list of activity for each DBA and progress reports on longer-range tasks.

7. The Contractor shall provide support from at least 8AM to 5PM, Monday through Friday for storage support. Occasional work may be required after hours, on weekends, and holidays and in those cases the Contractor shall be given at least two (2) days advanced notice.

8. The Contractor shall provide subject matter experts for special projects as requested. The Contractor shall study issues as they relate to the USPTO environment and shall document that analysis along with an action plan to remedy a problem, initiate a process or procedure, roll out products onto the appropriate servers and/or enhance current operations. This subject matter expert shall mentor both USPTO and Contractor personnel as necessary in the expertise.
9. The Contractor shall receive written and verbal assigned tasks from the Task Order Managers, COTR or a designated representative.
10. The Contractor shall analyze assigned tasks and provide estimated time frames to complete to the COTR or Task Order Manager. The Contractor shall provide justification for extending completion timeframes by more than two (2) workdays from the original estimated completion date. Ninety-eight (98) percent of these tasks must be completed within the agreed upon timeframe.
11. The Contractor shall record all change requests and problems in the USPTO's problem/change tracking system (EAMS) and will update all change/problem requests as required.

3. GOVERNMENT FURNISHED MATERIAL

The USPTO shall provide the following:

1. Access to USPTO's development and test systems and any required system, application, and data files from a central location at the USPTO.
2. Access to appropriate USPTO personnel and program documentation as required.
3. Access to escalation procedures and other DBAD procedures.
4. A central monitoring facility located in the DBAD suite.

The above items shall be available to the Contractor no later than the day after the effective date of this task order.

For this task order, the USPTO shall not provide the following:

1. Remote log-in access directly to the PTOnet; and
2. Access to root.

Any and all scripts and utilities developed for the USPTO during the execution of this contract shall become the property of the USPTO.

4. LEVEL OF EFFORT

The amount of work required to perform this task may vary from day to day. However, the Contractor is responsible for ensuring all work is performed within the time frame established by the USPTO Task Order Managers at time of assignment. No work outside

the scope of this Task Order will be performed without the written direction of the COTR. This option covers the period through September 30, 2003, however the Government reserves the right to de-scope this task order at any time. The Government will notify the Contractor at least ten (10) working days prior to termination of the task order.

5. PLACE OF PERFORMANCE

The Contractor shall accomplish all work performed for this task order at the USPTO facility in Arlington, Virginia. The facility consists of the DBA central monitoring facility and any of the OCIO computer room currently located in Crystal City (Arlington, Virginia).

6. SCHEDULE OF DELIVERABLES

Deliverable	Due Date
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task order.

8. TRAWICK RESPONSE

TO-06, March 1, 2003 – September 30, 2003 – Statement of Work for the Oracle Database Support Task – FMEUS2 contract

TRAWICK proposes to perform the work specified in the above Statement of Work for the period March 1, 2003 – September 30, 2003 with the following staffing level:

Labor Category	Quantity
[REDACTED]	[REDACTED]
Total	[REDACTED]

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

[REDACTED]

The following table represents the functional responsibilities, staffing levels, and labor categories selected to perform the work specified in the Statement of Work.

Responsibilities Matrix			
Function	Labor Category	Qty	Duties and Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

Responsibilities Matrix			
Function	Labor Category	Qty	Duties and Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

A. **Resource Summary.** The following table provides a high level summary of all labor hours, labor costs, and ODC costs for period of March 1, 2003 – September 30, 2003:

	Hours	Cost
[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	\$830,046.16

B. **Resources by labor category.** The following table provides a detailed break-down of labor hours and costs per labor category for period of March 1, 2003 – September 30, 2003:

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	[REDACTED]	[REDACTED]	\$830,046.16

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

ORDER FOR SUPPLIES OR SERVICES

IMPORTANT: Mark all packages and papers with contract number for order numbers.

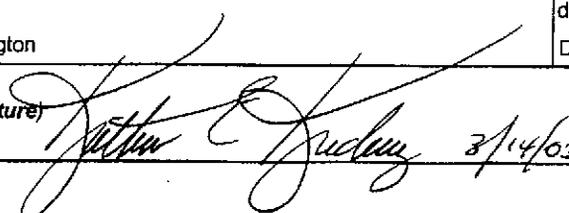
DATE OF ORDER 03/14/2003	2. CONTRACT NO. (If any) 50PAPT201025	6. SHIP TO: No Contacts Identified		
ORDER NO. 56PAPT305045	4. REQUISITION/REFERENCE NO. See Funding Detail	a. NAME OF CONSIGNEE		
ISSUING OFFICE (Address correspondence to) Office of Procurement J.S. Patent and Trademark Office 2011 Crystal Drive, Suite 810 Arlington VA 22202		b. STREET ADDRESS		
7. TO:		c. CITY	d. STATE	e. ZIP CODE
NAME OF CONTRACTOR Carol Trawick		f. SHIP VIA		
COMPANY NAME Trawick and Associates		8. TYPE OF ORDER		
STREET ADDRESS 6900 Wisconsin Avenue, Suite 400		<input type="checkbox"/> a. PURCHASE REFERENCE YOUR:		<input type="checkbox"/> b. DELIVERY - Except for billing instructions on the reverse, this delivery order is subject to instructions contained on this side only of this form and is issued subject to the terms and conditions of the above-numbered contract.
CITY Bethesda	e. STATE MD	f. ZIP CODE 20815		
ACCOUNTING AND APPROPRIATION DATA Funding Detail		10. REQUISITIONING OFFICE OCIO/DSM/Office of Acquisition Management		

BUSINESS CLASSIFICATION (Check appropriate box(es))			
<input checked="" type="checkbox"/> a. SMALL	<input type="checkbox"/> b. OTHER THAN SMALL	<input type="checkbox"/> c. DISADVANTAGED	<input checked="" type="checkbox"/> d. WOMEN-OWNED
F.O.B. POINT Destination	14. GOVERNMENT B/L NO.	15. DELIVER TO F.O.B. POINT ON OR BEFORE (Date)	16. DISCOUNT TERMS
13. PLACE OF INSPECTION	b. ACCEPTANCE		10 days % 20 days % 30 days % days %

17. SCHEDULE (See reverse for Rejections)

TEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
	SEE LINE ITEM DETAIL					

18. SHIPPING POINT	19. GROSS SHIPPING WEIGHT	20. INVOICE NO.		
21. MAIL INVOICE TO: (703) 305-8083				17(h) TOT. (Cont. pages)
a. NAME U.S. Patent and Trademark Office				
b. STREET ADDRESS (or P.O. Box) Office of Finance, Box 17				\$3,086,901.75
c. CITY Washington	d. STATE DC	e. ZIP CODE 20231		
17(i) GRAND TOTAL				

UNITED STATES OF AMERICA BY (Signature) 	23. NAME (Typed) Kate Kudrewicz TITLE: CONTRACTING/ORDERING OFFICER
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**ORDER FOR SUPPLIES OR SERVICES
SCHEDULE - CONTINUATION**

PAGE NO.
3 of 14

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER 03/14/2003	CONTRACT NO. 50PAPT201025	ORDER NO. 56PAPT305045
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EM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
01	<p><i>This is Task Order 56-PAPT-3-05045 to Contract No. 50-PAPT-2-01025. This task order is for Hardware Maintenance. See attached for task order details. The period of performance is from February 1, 2003 through September 30, 2003.</i></p> <p>Reference Requisition: 193P0330035</p> <p>Procurement P.O.C. Kate Kudrewicz (703) 305-8324. Program Office COTR, Tom King, (703) 305-8999. Contractor P.O.C. Elaine Watson, (703) 416-4105.</p>					

TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 17) ⇒ \$0.00

Contract Level Funding Summary	Document Number	Title	Page
	56PAPT305045	Hardware Maint. TO-17	4 of 14

2003 - - A - 193100 - - 2571 - - C50013 - 193431 - - - - NONCOMP - - - -
\$8,085.34

Reference Requisition: 193P0330035

2003 - - A - 192100 - - 2571 - - MZAMC1 - 192510 - - - - NONCOMP - - - -
\$70,000.00

Reference Requisition: 192P0330043

2003 - - A - 192100 - - 2571 - - MZAMC1 - 192510 - - - - NONCOMP - - - -
\$20,000.00

Reference Requisition: 192P0330043

2003 - - A - 192100 - - 2571 - - MZAMC1 - 192510 - - - - NONCOMP - - - -
\$14,000.00

Reference Requisition: 192P0330043

2003 - - A - 193100 - - 2571 - - MZMSC1 - 193431 - - - - NONCOMP - - - -
\$27,150.00

Reference Requisition: 193P0330067

2003 - - A - 193100 - - 2571 - - LZFAC1 - 193431 - - - - NONCOMP - - - -
\$5,400.00

Reference Requisition: 193P0330067

Contract Level Funding Summary	Document Number	Title	Page
	56PAPT305045	Hardware Maint. TO-17	5 of 14

003 - - A - 193100 - - 2571 - - LZACC1 - 193431 - - - - NONCOMP - - - -
11,710.00

Reference Requisition: 193P0330067

003 - - A - 193100 - - 2571 - - PZEBC1 - 193431 - - - - NONCOMP - - - -
3,600.00

Reference Requisition: 193P0330067

003 - - A - 193100 - - 2571 - - LZDMC1 - 193431 - - - - NONCOMP - - - -
3,000.00

Reference Requisition: 193P0330067

003 - - A - 193100 - - 2571 - - CZESC1 - 193431 - - - - NONCOMP - - - -
3,000.00

Reference Requisition: 193P0330067

003 - - A - 193100 - - 2571 - - CZJRC1 - 193431 - - - - NONCOMP - - - -
1,500.00

Reference Requisition: 193P0330067

003 - - A - 193100 - - 2571 - - CZSSC1 - 193431 - - - - NONCOMP - - - -
1,080.00

Reference Requisition: 193P0330067

Contract Level Funding Summary	Document Number	Title	Page
	56PAPT305045	Hardware Maint. TO-17	6 of 14

2003 - - A - 193100 - - 2571 - - LZEDC1 - 193431 - - - - NONCOMP - - - -
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Reference Requisition: 193P0330067

2003 - - A - 193100 - - 2571 - - CZFIC1 - 193431 - - - - NONCOMP - - - -
\$7,500.00

Reference Requisition: 193P0330067

2003 - - A - 193100 - - 2571 - - LZIAC1 - 193431 - - - - NONCOMP - - - -
\$4,280.00

Reference Requisition: 193P0330067

2003 - - A - 193100 - - 2571 - - DZUPC1 - 193431 - - - - NONCOMP - - - -
\$11,710.00

Reference Requisition: 193P0330067

2003 - - A - 193100 - - 2571 - - TZTMC1 - 193431 - - - - NONCOMP - - - -
\$57,420.00

Reference Requisition: 193P0330067

2003 - - A - 193100 - - 2571 - - MZRTC1 - 193431 - - - - NONCOMP - - - -
\$23,410.00

Reference Requisition: 193P0330067

Contract Level Funding Summary	Document Number	Title	Page
	56PAPT305045	Hardware Maint. TO-17	7 of 14

003 - - A - 193100 - - 2571 - - MZWLC1 - 193431 - - - - NONCOMP - - - -
43,700.00

Reference Requisition: 193P0330067

003 - - A - 193100 - - 2571 - - M50004 - 193431 - - - - NONCOMP - - - -
70,230.00

Reference Requisition: 193P0330067

003 - - A - 193100 - - 2571 - - PZEJC1 - 193431 - - - - NONCOMP - - - -
11,500.00

Reference Requisition: 193P0330067

003 - - A - 193100 - - 2571 - - M50004 - 193431 - - - - NONCOMP - - - -
4,050.00

Reference Requisition: 193P0330067

003 - - A - 193100 - - 2571 - - DZDOC1 - 193431 - - - - NONCOMP - - - -
4,050.00

Reference Requisition: 193P0330067

003 - - A - 193100 - - 2571 - - PZDSC1 - 193431 - - - - NONCOMP - - - -
8,690.00

Reference Requisition: 193P0330067

Contract Level Funding Summary	Document Number	Title	Page
	56PAPT305045	Hardware Maint. TO-17	8 of 14

2003 - - A - 193100 - - 2571 - - TZTRC1 - 193431 - - - - NONCOMP - - - -
\$13,500.00

Reference Requisition: 193P0330067

2003 - - A - 193100 - - 2571 - - CZDWC1 - 193431 - - - - NONCOMP - - - -
\$40,500.00

Reference Requisition: 193P0330067

2003 - - A - 193100 - - 2571 - - MZAMC1 - 193431 - - - - NONCOMP - - - -
\$14,990.00

Reference Requisition: 193P0330067

2003 - - A - 193100 - - 2571 - - DZOGC1 - 193431 - - - - NONCOMP - - - -
\$14,050.00

Reference Requisition: 193P0330067

2003 - - A - 193100 - - 2571 - - DZIDC1 - 193431 - - - - NONCOMP - - - -
\$31,830.00

Reference Requisition: 193P0330067

2003 - - A - 193100 - - 2571 - - CZRGC1 - 193431 - - - - NONCOMP - - - -
\$45,880.00

Reference Requisition: 193P0330067

Contract Level Funding Summary	Document Number	Title	Page
	56PAPT305045	Hardware Maint. TO-17	9 of 14

003 - - A - 193100 - - 2571 - - MZPMC1 - 193431 - - - - NONCOMP - - - -

18,730.00

Reference Requisition: 193P0330067

003 - - A - 193100 - - 2571 - - TZTXC1 - 193431 - - - - NONCOMP - - - -

94,500.00

Reference Requisition: 193P0330067

003 - - A - 193100 - - 2571 - - MZECC1 - 193431 - - - - NONCOMP - - - -

22,470.00

Reference Requisition: 193P0330067

003 - - A - 193100 - - 2571 - - PZAUC1 - 193431 - - - - NONCOMP - - - -

144,180.00

Reference Requisition: 193P0330067

003 - - A - 193100 - - 2571 - - PZRIC1 - 193431 - - - - NONCOMP - - - -

15,920.00

Reference Requisition: 193P0330067

003 - - A - 193100 - - 2571 - - PZPAC1 - 193431 - - - - NONCOMP - - - -

136,820.00

Reference Requisition: 193P0330067

Contract Level Funding Summary	Document Number	Title	Page
	56PAPT305045	Hardware Maint. TO-17	10 of 14

2003 - - A - 193100 - - 2571 - - PZIRC1 - 193431 - - - - NONCOMP - - - -
336,000.00

Reference Requisition: 193P0330067

2003 - - A - 193100 - - 2571 - - PZGNC1 - 193431 - - - - NONCOMP - - - -
26,220.00

Reference Requisition: 193P0330067

2003 - - A - 193100 - - 2571 - - PZEQC1 - 193431 - - - - NONCOMP - - - -
40,000.00

Reference Requisition: 193P0330067

2003 - - A - 193100 - - 2571 - - PZIQC1 - 193431 - - - - NONCOMP - - - -
88,020.00

Reference Requisition: 193P0330067

2003 - - A - 193100 - - 2571 - - PZAKC1 - 193431 - - - - NONCOMP - - - -
53,370.00

Reference Requisition: 193P0330067

2003 - - A - 193100 - - 2571 - - M50063 - 193431 - - - - NONCOMP - - - -
140,450.00

Reference Requisition: 193P0330067

Contract Level Funding Summary	Document Number	Title	Page
	56PAPT305045	Hardware Maint. TO-17	11 of 14

2003 - - A - 193100 - - 2571 - - PZ AFC1 - 193431 - - - - NONCOMP - - - -
\$18,270.00

Reference Requisition: 193P0330067

2003 - - A - 193100 - - 2571 - - MZFWC1 - 193431 - - - - NONCOMP - - - -
\$50,460.00

Reference Requisition: 193P0330067

2003 - - A - 193100 - - 2571 - - M50008 - 193431 - - - - NONCOMP - - - -
\$38,480.00

Reference Requisition: 193P0330067

2003 - - A - 193100 - - 2571 - - M50036 - 193431 - - - - NONCOMP - - - -
\$52,810.00

Reference Requisition: 193P0330067

2003 - - A - 193100 - - 2571 - - TZTMC1 - 193431 - - - - NONCOMP - - - -
\$33,290.00

Reference Requisition: 193P0330071

2003 - - A - 193100 - - 2571 - - PZPAC1 - 193431 - - - - NONCOMP - - - -
\$65,000.00

Reference Requisition: 193P0330071

Contract Level Funding Summary	Document Number	Title	Page
	56PAPT305045	Hardware Maint. TO-17	12 of 14

2003 - - A - 193100 - - 2571 - - PZPAC1 - 193431 - - - - NONCOMP - - - -
\$65,000.00

Reference Requisition: 193P0330071

2003 - - A - 193100 - - 2571 - - PZSSC1 - 193431 - - - - NONCOMP - - - -
\$67,360.00

Reference Requisition: 193P0330072

2003 - - A - 193100 - - 2571 - - M50004 - 193431 - - - - NONCOMP - - - -
\$4,820.00

Reference Requisition: 193P0330072

2003 - - A - 193100 - - 2571 - - MZFWC1 - 193431 - - - - NONCOMP - - - -
\$5,350.00

Reference Requisition: 193P0330072

2003 - - A - 193100 - - 2570 - - P50023 - 193230 - - - - NONCOMP - - - -
\$365,141.25

Reference Requisition: 193P0330078

2003 - - A - 193100 - - 2571 - - M50010 - 193441 - - - - NONCOMP - - - -
\$568,066.05

Reference Requisition: 193P0330097

Contract Level Funding Summary	Document Number	Title	Page
	56PAPT305045	Hardware Maint. TO-17	13 of 14

003 - - A - 193100 - - 2571 - - PZEFC1 - 193431 - - - - NONCOMP - - - -
70,000.00

Reference Requisition: 193P0330099

003 - - A - 193100 - - 2571 - - M50014 - 193431 - - - - NONCOMP - - - -
25,380.00

Reference Requisition: 193P0330099

003 - - A - 193100 - - 2571 - - LZABC1 - 193431 - - - - NONCOMP - - - -
23,410.00

Reference Requisition: 193P0330099

003 - - A - 193100 - - 2571 - - DZDOC1 - 193431 - - - - NONCOMP - - - -
14,449.11

Reference Requisition: 193P0330099

003 - - A - 193100 - - 2571 - - TZDIC1 - 193431 - - - - NONCOMP - - - -
16,520.00

Reference Requisition: 193P0330099

003 - - A - 193100 - - 2571 - - PZPAC1 - 193431 - - - - NONCOMP - - - -
2,080.00

Reference Requisition: 193P0330099

Contract Level Funding Summary	Document Number	Title	Page
	56PAPT305045	Hardware Maint. TO-17	14 of 14

2003 - - A - 193100 - - 2571 - - PZGNC1 - 193431 - - - - NONCOMP - - - -
 \$8,320.00

Reference Requisition: 193P0330099

2003 - - A - 193100 - - 2571 - - PZAKC1 - 193431 - - - - NONCOMP - - - -
 \$12,480.00

Reference Requisition: 193P0330099

2003 - - A - 193100 - - 2571 - - LZDMC1 - 193431 - - - - NONCOMP - - - -
 \$8,160.00

Reference Requisition: 193P0330099

2003 - - A - 193100 - - 2571 - - TZCRC1 - 193431 - - - - NONCOMP - - - -
 \$6,240.00

Reference Requisition: 193P0330099

2003 - - A - 193100 - - 2571 - - PZTAC1 - 193431 - - - - NONCOMP - - - -
 \$8,320.00

Reference Requisition: 193P0330099

Total Funding: \$3,086,901.75

Office of the Chief Information Officer FMEUS2 Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999 Jack Bowles 305- 8324	Hardware Maintenance Consolidation (TO-17)	Karl Fink 305-8947

1. BACKGROUND

The United States Patent and Trademark Office (USPTO) uses a variety of contracts and purchase orders to provide hardware maintenance on an entire spectrum of devices. This includes but is not limited to mainframes, ATLS, scanners, non-desktop printers, UNIX/NT servers, routers, hubs, etc. This task is to cover the items below as well as any other miscellaneous items.

2. STATEMENT OF WORK

- 2.1 The contractor shall follow all USPTO policies and procedures for tracking problems, changes, and asset updates using the EAMS system.
- 2.2 The contractor shall utilize Psion units to record ALL changes to asset configurations.
- 2.3 The contractor shall ensure that updated equipment inventory is provided to the Help Desk within twenty-four (24) hours of the government providing updates to the contractor.
- 2.4 The contractor shall perform Preventive Maintenance (PM) on all equipment as recommended by the OEM without any additional charge to the government.
- 2.5 The contractor shall not charge extra for any corrective maintenance requested during the Principal Period of Maintenance (PPM) regardless of when the maintenance is performed.
- 2.6 The contractor shall not charge to move equipment as long as the equipment is moved within the same geographical location (i.e. from building to building or floor to floor within Crystal City).
- 2.7 **Promark Group Printer Support** - The contractor shall provide group printer operation and maintenance support from 6:00 a.m. to 6 p.m. Monday through Friday. See Attachment "Promark Inventory 020103.xls" for an inventory of the equipment covered under this task order, provided by COTR.
- 2.8 **Xerox Production Printer Support** – The contractor shall provide operations and maintenance support from 8:00 am to 5:00 pm, Monday through Friday. The Xerox 4635 will be covered 24 hours per day, Monday through Friday. See

Attachment "Xerox Inventory 020103.xls" for an inventory of the equipment covered under this task order, provided by COTR.

- 2.9 Boyers, Pa. IBM Mainframe and Peripheral Support** - The contractor shall provide on-call maintenance service with next day response time nine (9) hours a day five (5) days a week (Monday through Friday, from 0800 to 1700). See Attachment "Boyer Equipment 020103.xls" for an inventory of the equipment covered under this task order, provided by COTR.
- 2.10 HP UX Hardware Maintenance** – The contractor shall provide on-call maintenance service with a two (2) hours response time and a four (4) hour repair time, during the PPM, which is defined as the twelve (12) consecutive hours between 6:00 am & 6:00 pm, Monday through Friday. Should the Government require maintenance service outside the designated PPM (OPPM), a response time of four (4) hours is required with a six (6) hour repair time. See the attachment "HP UX Inventory 020103.xls" for an inventory of the equipment covered under this task order, provided by COTR.
- 2.11 SUN Hardware Maintenance** – The contractor shall provide on-call maintenance service with a two (2) hours response time and a four (4) hour repair time, during PPM which is defined as the twelve (12) consecutive hours between 6:00 am & 6:00 pm, Monday through Friday except the following Federal Holidays: Thanksgiving, Christmas, and New Years. See Attachments "ABSS SUN Equipment 020103.xls and CDS SUN Equipment 020103.xls" for an inventory of the equipment covered under this task order, provided by COTR.
- 2.12 Psion Hardware Maintenance (non-Asset Management)** – See Attachment "Psion Inventory 090702.xls" for an inventory of the equipment covered under this task order, provided by COTR.
- 2.13 Psion Hardware Maintenance (Asset Management)** – See Attachment "Psion Inventory AM 020103.xls" for an inventory of the equipment covered under this task order, provided by COTR.
- 2.14 Nortel Network Equipment Maintenance** – Nortel Passport 8600 (quantity of 38), Contivity Switches (quantity of 2), and Passport 8100 (quantity of 149) service pack, return, and replacement services. See Attachment "Nortel Inventory 020103.xls", provided by COTR.
- 3. GOVERNMENT FURNISHED MATERIAL**
The government shall provide access to the EAMS and Psion Units as necessary to perform the work.

4. LEVEL OF EFFORT

The Government, reserves the right to de-scope this task order at any time. The Government will notify the Contractor at least ten (10) working days prior to termination of the task order.

5. PLACE OF PERFORMANCE

Work will be performed in Crystal City, VA; in contractor leased facilities in Crystal City and Merrifield, VA; and Boyers, PA.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the COTR (electronic form preferred).

Deliverable	Due Date
EAMS Problem Report	10 th day of each Month

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (LCM)

LCM is required under this task order.

8. TRAWICK RESPONSE

The following provides a summary cost estimate for the Hardware Maintenance Task (TO-17) from February 1, 2003 through September 30, 2003.

Description	Hours	Cost
[REDACTED]	[REDACTED]	[REDACTED]
Total Maintenance & Support	[REDACTED]	\$3,086,901.75

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

[REDACTED]

ORDER FOR SUPPLIES OR SERVICES

PAGE OF PAGES

1 6

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

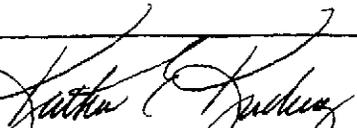
1. DATE OF ORDER 03/14/2003		2. CONTRACT NO. (If any) 50PAPT201025		6. SHIP TO: No Contacts Identified		
3. ORDER NO. 56PAPT305046		4. REQUISITION/REFERENCE NO. See Funding Detail		a. NAME OF CONSIGNEE OFFICE OF PROCUREMENT		
5. ISSUING OFFICE (Address correspondence to) Office of Procurement U.S. Patent and Trademark Office 2011 Crystal Drive, Suite 810 Arlington VA 22202				b. STREET ADDRESS Office of Procurement US Patent and Trademark Office 2011 Crystal Drive Suite 810		
c. CITY Arlington		d. STATE VA	e. ZIP CODE 22202			
7. TO: NAME OF CONTRACTOR Carol Trawick COMPANY NAME Trawick and Associates STREET ADDRESS 6900 Wisconsin Avenue, Suite 400 CITY Bethesda MD 20815				f. SHIP VIA		
				8. TYPE OF ORDER <input type="checkbox"/> a. PURCHASE REFERENCE YOUR: <input type="checkbox"/> b. DELIVERY - Except for billing instructions on the reverse, this delivery order is subject to instructions contained on this side only of this form and is issued subject to the terms and conditions of the above-numbered contract.		
ACCOUNTING AND APPROPRIATION DATA Funding Detail				10. REQUISITIONING OFFICE OCIO / OCSS / DSD		

BUSINESS CLASSIFICATION (Check appropriate box(es)) <input checked="" type="checkbox"/> a. SMALL <input type="checkbox"/> b. OTHER THAN SMALL <input type="checkbox"/> c. DISADVANTAGED <input checked="" type="checkbox"/> d. WOMEN-OWNED					
F.O.B. POINT Destination		14. GOVERNMENT B/L NO.	15. DELIVER TO F.O.B. POINT ON OR BEFORE (Date)	16. DISCOUNT TERMS 10 days % 20 days % 30 days % days %	
13. PLACE OF INSPECTION		b. ACCEPTANCE			

17. SCHEDULE (See reverse for Rejections)

EM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
	SEE LINE ITEM DETAIL					

18. SHIPPING POINT		19. GROSS SHIPPING WEIGHT		20. INVOICE NO.		17(h) TOT. (Cont. pages)
21. MAIL INVOICE TO: (703) 305-8083						
BILLING INSTRUCTIONS ON REVERSE	a. NAME U.S. Patent and Trademark Office					\$1,055,743.30
	b. STREET ADDRESS (or P.O. Box) Office of Finance, Box 17					
	c. CITY Washington		d. STATE DC	e. ZIP CODE 20231		
	17(i) GRAND TOTAL					

UNITED STATES OF AMERICA BY (Signature)  3/14/03		23. NAME (Typed) Kate Kudrewicz TITLE: CONTRACTING OFFICER	
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**ORDER FOR SUPPLIES OR SERVICES
SCHEDULE - CONTINUATION**

PAGE NO.
3 of 6

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER 03/14/2003	CONTRACT NO. 50PAPT201025	ORDER NO. 56PAPT305046
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ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
0001	<p><i>This is Task Order 56-PAPT-3-05046 to Contract No. 50-PAPT-2-01025. This task order is for Desktop Deployments and Moves. See Attached for task order details. The period of performance is February 1, 2003 through June 30, 2003.</i></p> <p>Reference Requisition: 193P0330090</p> <p><i>Procurement P.O.C. Kate Kudrawicz, (703) 305-8324. Program Office COTR, Tom King (703) 305-8999. Contractor P.O.C. (703) 416-4105.</i></p>					

TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 171) ⇒ 50.00

Contract Level Funding Summary	Document Number 56PAPT305046	Title Desktop Deployments TO-04	Page 4 of 6
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2003 - - A - 193100 - - 2570 - - C50020 - 193230 - - - - NONCOMP - - - -
\$23,220.00

Reference Requisition: 193P0330090

2003 - - A - 193100 - - 2570 - - M50020 - 193230 - - - - NONCOMP - - - -
\$31,580.00

Reference Requisition: 193P0330090

2003 - - A - 193100 - - 2570 - - P50020 - 193230 - - - - NONCOMP - - - -
150,010.00

Reference Requisition: 193P0330090

2003 - - A - 193100 - - 2570 - - L50020 - 193230 - - - - NONCOMP - - - -
1,890.00

Reference Requisition: 193P0330090

2003 - - A - 193100 - - 2570 - - T50020 - 193230 - - - - NONCOMP - - - -
1,710.00

Reference Requisition: 193P0330090

2003 - - A - 193100 - - 2570 - - C50021 - 193230 - - - - NONCOMP - - - -
50.00

Reference Requisition: 193P0330090

Contract Level Funding Summary	Document Number 56PAPT305046	Title Desktop Deployments TO-04	Page 5 of 6
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2003 - - A - 193100 - - 2570 - - M50021 - 193230 - - - - NONCOMP - - - -
\$23,530.00

Reference Requisition: 193P0330090

2003 - - A - 193100 - - 2570 - - P50021 - 193230 - - - - NONCOMP - - - -
\$269,120.00

Reference Requisition: 193P0330090

003 - - A - 193100 - - 2570 - - L50021 - 193230 - - - - NONCOMP - - - -
7,850.00

Reference Requisition: 193P0330090

003 - - A - 193100 - - 2570 - - T50021 - 193230 - - - - NONCOMP - - - -
3,060.00

Reference Requisition: 193P0330090

003 - - A - 193100 - - 2570 - - M50023 - 193230 - - - - NONCOMP - - - -
17,058.98

Reference Requisition: 193P0330090

003 - - A - 133100 - - 2571 - - 330190 - 133100 - - - - NONCOMP - - - -
01.80

Reference Requisition: 1330330079

Contract Level Funding Summary	Document Number 56PAPT305046	Title Desktop Deployments TO-04	Page 6 of 6
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3003 - - A - 133100 - - 2571 - - 330190 - 133100 - - - - NONCOMP - - - -

18,165.00

Reference Requisition: 1330330079

003 - - A - 133100 - - 2571 - - 330190 - 133100 - - - - NONCOMP - - - -

16,067.52

Reference Requisition: 1330330084

103 - - A - 193100 - - 2570 - - P50105 - 193230 - - - - NONCOMP - - - -

17,530.00

Reference Requisition: 193P0330038

Total Funding: \$1,055,743.30

DESKTOP DEPLOYMENT AND MOVE SUPPORT
TASK ORDER TO-04

CONTRACT NO.: 50-PAPT-2-01025 ORDER NO.: 56-PAPT-3-05046
 EFFECTIVE DATE: February 1, 2003
 REQUISITION NO.: 193P0330090, 133P0330079, 133P0330084 AND 13P0330038

ISSUED BY: U.S. PATENT AND TRADEMARK OFFICE
 OFFICE OF PROCUREMENT
 BOX 6
 WASHINGTON, DC 20231

ISSUED TO: TRAWICK AND ASSOCIATES
 6900 WISCONSON AVENUE
 SUITE 400
 BETHESDA, MD 20815

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL				\$929,878.98

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

	Hours	Cost
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
TOTAL (Not-to-Exceed) Cost for TO-04		\$1,055,743.30

This task order is issued pursuant to the authority of the Contracting Officer and Special Contract Requirements, Clause H.17. TASK ORDERS PROCEDURES of the contract.

The contractor shall provide the necessary personnel and materials to accomplish this task in accordance with the statement of work, task list, and contractor work plan as approved and attached. The Contractor or any of its subcontractors shall not exceed the ceiling amount provided above in performance of this task order, without prior written approval and an executed modification to this task order.

The effective period of performance of this delivery/task order shall be from the effective date of this order through June 30, 2003, unless otherwise mutually agreed upon and properly modified by the Contracting Officer and Trawick and Associates.

Office of the Chief Information Officer FMEUS2 Statement of Work		
COTR	Task Title	Task Managers
Tom King 305-8999 Jack Bowles 305-8823	Desktop Deployment & Move (TO-04)	Joe Vastola 305-3650

NOTE: Toshia Ross / Demita Durant is the POC's for the CRP Patents Interviewers / Follow Up Techs. . The CRP Patents interviewers will be supervised by Toshia and Demita but will be trained to do interviews and follow up similarly to other CRP/Deploy/Move staff. They will be responsible for the same skills and using the same tools (e.g. interview template versus a paper template).

1. BACKGROUND

This task order includes but is not limited to support of the USPTO desktop lifecycle from installation, configuration, move, deployment, and surplus (including support of the USPTO CPU Replacement Program – CRP). The term desktop includes but is not limited to:

- USPTO approved desktop CPU's, approved and untested laptops /docking stations, barcode readers (BCR) and accompanying peripherals which include desktop and network printers, scanners, keyboards, monitors, scan guns, and other equipment common to the PTO environment. (see 2.18 for more detail on untested laptops).
- USPTO approved desktop workstation operating systems; USPTO approved desktop COTS software and desktop AIS.

Also included are the desktop move and surplus support requirements of miscellaneous USPTO hardware. For example, scanners, modems, LAN probes, routers, hubs, stand-alone servers, DVD towers, jukeboxes, fax machines and convenience copiers (e.g. copiers not connected to a desktop), etc.

Period of performance for this task order is from 2/1/03 to 6/30/03.

2. STATEMENT OF WORK REQUIREMENTS

1. Contractors shall abide by all OCIO Task Manager Directives, Service Level Agreements (SLA), Operational Support Plans and Technical Notes.
2. Contractor shall provide support from 8:00 AM to 6:00 PM local time, Monday through Friday (excluding federal holidays) unless otherwise indicated in this task order (i.e. #30). If a move of 5 desktops or less is scheduled prior to 8:00 AM, contractor shall accommodate the move.
3. Contractor shall maintain a minimum 95% customer satisfaction rating at all times. This translates to Contractor receiving no more than 5% "re-opened" and "unsatisfactory" ratings. Ratings will be measured through the Customer Quality Check process. The rating levels given during the quality checks are outstanding, very good, satisfactory, unsatisfactory and re-open.
4. Whenever working on desktop equipment, contractor shall use a grounding strap to protect the equipment from Electrostatic Discharge (ESD) damage. The grounding strap should conform to the American National Standards Institute (ANSI) standards in regard to EOS/ESD Grounding. The strap should be tested for functionality on a regular basis (daily testing is recommended). In addition to the strap, all electronic components should always be stored in enclosed anti-static bags when not being handled.

5. Any desktop, peripheral or component moved, delivered or installed into service by Contractor shall be fully functional. If replacing a desktop, peripheral or component, replacement must be equivalent or of better performance. If the customer has data files, documents, or other files on the desktop hardware, contractor shall ensure that such files (when not damaged) are transferred to the replacement computer.
6. Any desktop, peripheral or component moved, delivered or installed into service by Contractor shall be locked down as required.
7. Contractor shall report any vandalism, theft or damage to desktop equipment that they are notified of or are witnesses to, to USPTO Security and task manager immediately.
8. Contractor shall perform a Root Cause Analysis (RCA) for resolved problems when requested by the Task Manager.
9. Contractor shall be responsible for resolving problems associated with the CPU replacements / deployments / moves. Contractor shall respond to 95% of problems within two (2) hours of receipt of problem ticket. A response is defined as speaking to the customer, leaving a voice mail message for the customer, sending an email message to the customer or leaving a work service form at the customer's site. Contractor shall resolve/circumvent 95% of problems within four (4) hours of receipt of problem ticket. These commitments apply to all problems assigned to the Contractor, unless otherwise stipulated in this Task Order (TO) or Service Level Agreements.
10. Contractor shall create and update a change record (e.g. in EAMS) for each user installation / replacement / move / surplus completed if there is not an existing ticket. If the move is for a group of 10 or more desktop hardware units, then the creation of one change record is also acceptable. At the time of resolution of the ticket, the contractor shall attach a summary report of the installation data to the ticket so other support groups will have access to information revolving around the installation / replacement / move / surplus.
11. Contractor shall thoroughly document all work they perform in the appropriate problem/change record. Contractor will update problem/change record after each new status. If contractor is out in the field working on a problem/change record, they shall utilize cell phones to communicate to Contractor teammates to update problem/change records in problem/change record management system (e.g. EAMS) as soon as there is a new status
12. If Contractor performs a site visit and the customer is available, prior to leaving the site the contractor shall confirm with the customer their satisfaction with the work performed. This confirmation will be captured by the act of the customer signing and dating the work service form. Regardless if the customer is available during a site visit or not, the contractor shall always leave a work service form with the customer. This work service form will be accurate, legible and include the following information: an explanation of work performed during the site visit, a place where the customer can confirm the visit was satisfactory, a problem/change record number if applicable, the contractor individual(s) name who made the site visit, the contractors phone number and a POC in the event there are any questions the customer needs answered after the contractor leaves the site. One copy of the form will be left with the customer; one will be kept in the Contractor's records.
13. Contractor shall not close or resolve any records without obtaining confirmation from the customer that the service has been performed or the problem has been resolved; an exception is made if three (3) attempts to contact a customer over a three (3)-day period do not produce a response from the customer. In case the customer does not have phone or email and there is a designated Point of Contact (POC), the contractor will contact the POC.

14. Contractor shall work with the Desktop Field Support Desktop Services Division (DSD) liaisons (see Desktop Field Support task order, FMEUS II TO-08) to maintain and update all Field Support Processes. These include but are not limited to the full lifecycle of the deployment process, including scheduling, interviewing, installing, deploying and quality check processes as well as desktop maintenance and desktop move/surplus support processes.
15. All hardware and supplies provided under this task order must be approved by USPTO T&E HW / SW.
16. Contractor shall be responsible for the receipt and tracking of all hardware shipped to the Contractor's facility on behalf of the USPTO.
17. Contractor shall use the mobile (Psion) units to record all hardware changes for asset management purposes.
18. Contractor shall provide "best effort" support to untested USPTO laptops / docking stations. Contractor shall keep customer and, if necessary, task manager informed of status. Contractor shall attempt to set customer expectations at the time the ticket is serviced. Contractor shall attempt to work within the requirements of the appropriate SLA if possible.
19. Contractor shall be responsible for requests to lockdown USPTO desktop hardware. These requests shall be treated as problem tickets and shall fall under the 2/4-hour commitment as defined in number nine (9).
20. Contractor shall deploy workstations Monday through Friday of each week at the following rates:
 - 47 Per week (Patents – 40 [at a rate of 8/day], Trademark – 2, OCIO –3; Policy – 1, and OCFO – 1)
 - Workstation consists of CPU, monitor and printer
 - Three (3) Peripheral delivery/set-ups are equivalent to one (1) workstation w/ the exception of network printers, which are equivalent to one (1) workstation.
21. Contractor shall establish an installation date within three (3) days of request receipt and shall commit to a four (4) hour timeslot with customer to complete installation.
22. Contractor shall interview customers Monday through Friday, 1-2 business days before scheduled installation unless otherwise agreed upon by DSD and Business Representatives.
23. Contractor shall remove the old workstation / peripherals at the time of the deployment / replacement.
24. During replacement / deployment, Contractor shall replace all items purchased by customer unless customer requests otherwise. These items include accessories provided in CPU "goodie box." Examples include network cables, speakers, mice, keyboards, etc. All items not used by customer shall be added to spare parts inventory.
25. During deployments, Contractor shall perform hardware/software-related services requested by the customer that require less than 30 minutes to perform. In the event it would take longer, the Contractor will create a change record for the customer in order for a technician to complete the request on a separate visit (e.g. move Jaz drive from customer's old PC to new PC).
26. If a CPU replacement or hardware deployment is cancelled by customer and it either cannot be rescheduled within five (5) business days or customer requests it not to be rescheduled within five (5) business days, Contractor shall have equipment returned to the Contractor warehouse.

27. Contractor shall support the Patent desktop hardware storage area (Crystal Park 3, 9th floor). This support shall consist of the following:
- Log all hardware as it enters and leaves the storage area.
 - Test all hardware as it arrives in the storage area. Label the hardware with a brief description of any problems identified during testing.
 - Perform the quarterly asset certification.
 - Label, box, and shelve speakers, cables, keyboards, and small peripherals.
 - Serve as the point-of-contact for any storage room hardware that needs to be deployed or surplused.
 - Remove reusable parts from surplus PCs. These parts may include Matrox video cards, Adaptec SCSI cards, Creative Lab sound cards, Seagate SCSI hard drives, cables, and floppy drives. Record items on surplus report and arrange for surplus spare parts to be added to spare parts inventory. Arrange for the surplus of the PCs.
 - Sign in and out lockdown kit items (e.g., locks, cables, brackets, etc.).
 - Staff the storage area Monday through Friday, from 8 AM to 5 PM.
28. Contractor shall, on average, move/surplus up to 30 desktop hardware units per day. A unit may be a CPU and all its peripherals or a single stand-alone device, such as a network printer. The number of moves per business area per day is as follows:
- Patents – 19, Trademarks – 5, OCIO – 3, Policy – 1, and OCFO – 2.
29. Contractor shall complete requests to move/surplus ten (10) or fewer desktop hardware units within one (1) day of receipt of request. Exceptions may be made if customer requests a later, specific move/surplus date.
30. Contractor shall complete requests to move/surplus more than ten (10) desktop hardware units within five (5) days of receipt of the request. Exceptions may be made if customer requests a later, specific move/surplus date or if the move/surplus schedule is already fully booked.
31. Contractor shall schedule a four (4) hour timeslot with the customer of a move/surplus. This is to inform the customer as to when they should expect the Contractor to begin and complete move/surplus.
32. Contractor shall do deployments including CPU replacements, moves, and surpluses, as necessary, to the three warehouses listed below:

RTIS Contractor 3443 Carlyn Springs Road Bailey's Crossroad, VA 22041 Telephone: 703 750-9580 POC: Bill Docca	Franconia Warehouse 6808 Loisdale Road Springfield, VA Telephone: 703-924-6058 and 703-924-9382 POC: Duane Davis and Nick Massillon	Fullerton Center (Newington Warehouse) 7401 Fullerton Road Springfield, VA Telephone: 703-644-1700 POC: Jerry Hill
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33. Contractor shall have dedicated technical/customer service follow up staff that will visit each user who had a PC/peripheral replacement/installation/move the previous day. Their responsibility will be to check on how the replacement/installation/move process went, answer any questions, provide information and fix any lingering problem (basically be the customer's personal support team for issues related to the replacement/installation/move). They shall also report back to the contractor management who will report to DSD Task Manager on lessons learned so they can be immediately incorporated in the daily process. If the customer's are unavailable during visits, the contractor shall leave a written message on the purpose of their visit, how they can be reached and indicate they will follow up again the next day. These customers will be revisited for three business days, if there is no response from the customer, the duties of this team shall be complete.

If the customer will be out of the office for an extended period of time after a replacement (e.g. more than 3 days), it is the responsibility of the follow up team specifically to ensure the customer is contacted when they are back in the office to go through this process. Of the technical/customer service follow up staff, two shall be dedicated to Patent only PC / peripheral / software replacements/installations/moves. The Patent support team of SIRA shall supervise these two techs.

34. The contractor shall notify the customer POC of their warehouse equipment delivery (ies) within one business day after the equipment is processed at the warehouse and aid in the coordination of the deployment.
35. Contractor shall retain customer's old PC after a replacement for five (5) business days in the event customer experiences problems that require the old PC to resolve.

3. GOVERNMENT FURNISHED MATERIAL

All software and hardware, Psion units, PTONet connections necessary to complete the installations and the list of CPUs, customers and their locations that need to be replaced for the task order time frame.

4. LEVEL OF EFFORT

No work outside the scope of this Task Order will be performed without the written direction of the COTR. This option covers the period through from 2/1/03 to 6/30/03, however the Government, reserves the right to de-scope this task order at any time. The Government will notify Contractor ten (10) working days prior to termination of the task order.

5. PLACE OF PERFORMANCE

Work shall be performed throughout the various buildings occupied by the USPTO in Crystal City, VA; Springfield, VA; and Bailey's Crossroads, VA and in the contractor-leased facilities in Crystal City and Alexandria, VA.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the USPTO COTR and Task Manager (electronic form preferred).

Daily summary activity report	Update Deployment daily spreadsheet on shared server with all workstation deployments, removals, peripheral delivery/set-ups, and CPU upgrades performed; figures must be broken out by business area (Patents, Trademarks, OCIO, Policy, and OCFO)	By Noon of the following business day
Daily detailed activity report	Update Deployment daily spreadsheet on shared server with all workstation deployments, removals, peripheral delivery/set-ups, and CPU upgrades performed; for each provide DO #, customer POC, location, workstation ID, property custodian, business area (Patents, Trademarks, OCIO, Policy, and OCFO)	By Noon of the following business day
Monthly summary activity report	Report/Graph showing all workstation deployments, removals, peripheral delivery/set-ups, and CPU upgrades performed; figures must be broken out by business area (Patents, Trademarks, OCIO, Policy, and OCFO)	Included in End of Month Report
Surplus Report	Report listing all reusable parts removed from PCs in the Patent storage area. Report includes the CD number of the PC, description of the part (including make/model if appropriate), the date the part was removed, and the date the part was delivered to the Desktop Field Support group.	As directed by DSD
Completed Moves Report	Update Move daily spreadsheet on shared server to include change record number, customer business area (OCIO, Patents,	By COB each day

		Trademarks, OCFO, or Policy), move date, number of workstation moves, number of non-workstation moves, two-stage move (Y/N), number of pieces surplus, # lockdowns only. The report should be sorted and totaled by customer business area. [Note: Workstation denotes a CPU and its peripherals; Non-Workstation denotes individual workstation pieces or network printer, scanner, etc.]	
Monthly summary report	Moves activity	Report/Graph showing all workstation/non-workstation moves performed; figures must be broken out by business area (Patents, Trademarks, OCIO, Policy, and OCFO)	Included in End of Month Report
RCA		Root Cause Analysis reports	Within two days of assignment
Individual Installation Report for EAMS		Report that includes all pertinent data collected by the database for each individual installation that shall be attached to that installation's EAMS ticket.	Upon completion of each EAMS ticket for each installation.
Workstation ID – New, Retired, Recycled		Spreadsheet report identifying all new Workstation ID's used, Workstation ID's retired or recycled as a result of support from any DSD contractor.	By 1pm of the following business day
Problem and Change Records		Contractor shall fully document all customer support related activities in the appropriate problem and change records	Records updates must be made within one hour after the completion of an activity

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task order.

8. TRAWICK RESPONSE

TO-04, February 1, 2003 – June 30, 2003 – Statement of Work for the Desktop Deployments and Moves (DDM) Task – FMEUS2 contract

TRAWICK proposes to perform the work specified in the above Statement of Work for the period February 1, 2003 – June 30, 2003 with the following staffing level:

Labor Category

Quantity

[REDACTED]

[REDACTED]

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

Total

Responsible Manager	
Director	Office and Information Systems
Supervisor	
Management	

[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

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EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

In addition, as requested by the COTR, the following dollar amounts were added to the task order to cover special projects.

Description	Req Number	Date of Service	Amount
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Total Special Projects	[REDACTED]	[REDACTED]	[REDACTED]

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

1. CONTRACT ID CODE _____ Page 1 of 3

2. AMENDMENT/MODIFICATION NO. 0001 3. EFFECTIVE DATE 04/04/2003 4. REQUISITION/PURCHASE REQ. NO. See Funding Detail 5. PROJECT NO: (If applicable)

6. ISSUED BY CODE 17 Office of Procurement J.S. Patent and Trademark Office, 2011 Crystal Drive, Suite 810 Arlington, VA 22202 7. ADMINISTERED BY (If other than Item 6) CODE

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and Zip Code) Carol Trawick Trawick and Associates 6900 Wisconsin Avenue, Suite 400 Bethesda, MD 20815 9A. AMENDMENT OF SOLICITATION NO. 9B. DATED (SEE ITEM 11) 10A. MODIFICATION OF CONTRACT/ORDER NO. 50PAPT201025 / 56PAPT305046 (X) 10B. DATED (SEE ITEM 13) 03/14/2003 (X)

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers is extended, is not extended. Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

ACCOUNTING AND APPROPRIATION DATA (If required) 2003 - - A - 192100 - - 2570 - - TZTXC1 - 192361 - - - - NONCOMP - - - - \$11,697.02

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A. B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b). C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF: D. OTHER (Specify type of modification and authority) Changes and Task Order Clauses of the Contract

IMPORTANT: Contractor is not, is required to sign this document and return _____ copies to the issuing office.

DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.) Attached.

As provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect. NAME AND TITLE OF SIGNER (Type or print) 16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) Kate Kudrewicz CONTRACTOR/OFFEROR 15C. DATE SIGNED 16B. United States of America 16C. DATE SIGNED 04/04/2003 BY (Signature of person authorized to sign) (Signature of Contracting Officer)

Line Item Summary	Document Number 56PAPT305046/0001	Title Desktop Deployments TO-04	Page 2 of 3
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FYs Fund Budget Org Sub Object Class Sub Program Cost Org Sub Proj/Job No. Sub Reporting Category

Division Closed FYs Cancelled Fund

Line Item Number	Description	Delivery Date (Start date to End date)	Quantity	Unit of Issue	Unit Price	Total Cost
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This is Task Order 56-PAPT-3-05046/0001 to Contract No. 50-PAPT-2-01025. This task order is for Desktop Deployments and Moves. See Attached for task order details. The period of performance is February 1, 2003 through June 30, 2003.

No Changed Line Item Fields

Previous Total: \$1,055,743.30
Modification Total: \$11,697.02
Grand Total: \$1,067,440.32

urement P.O.C. Kate Kudrewicz, (703) 305-8324. Program Office COTR, Tom King (703) 305-8999. Contractor P.O.C. (703) 416-4105.

Contract Level Funding Summary	Document Number 56PAPT305046/0001	Title Desktop Deployments TO-04	Page 3 of 3
-------------------------------------------	---------------------------------------------	-------------------------------------------	-----------------------

Funding Strip Code
2003 - - A - 192100 - - 2570 - - TZTXC1 - 192361 - - - - NONCOMP - - - -

Change in Funded Amount
\$11,697.02

Reference Requisition: 192P0330105

DESKTOP DEPLOYMENT AND MOVE SUPPORT
TASK ORDER TO-04/MO01

CONTRACT NO.: 50-PAPT-2-01025 ORDER NO.: 56-PAPT-3-05046/0001
EFFECTIVE DATE: March 13, 2003
REQUISITION NO.: 192P0330105

ISSUED BY: U.S. PATENT AND TRADEMARK OFFICE
OFFICE OF PROCUREMENT
BOX 6
WASHINGTON, DC 20231

ISSUED TO: TRAWICK AND ASSOCIATES
6900 WISCONSON AVENUE
SUITE 400
BETHESDA, MD 20815

ACCOUNTING AND APPROPRIATION DATA:
2003 A 192100 2570 TZTXC1 192361 OBLIGATE: \$11,697.02

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Total	[REDACTED]	[REDACTED]	[REDACTED]	\$11,697.02

	Hours	Cost
[REDACTED]	[REDACTED]	[REDACTED]
TOTAL (Not-to-Exceed) Cost for TO-04 AND MODS	[REDACTED]	\$1,067,017.54

This task order is issued pursuant to the authority of the Contracting Officer and Special Contract Requirements, Clause H.17. TASK ORDERS PROCEDURES of the contract.

The contractor shall provide the necessary personnel and materials to accomplish this task in accordance with the statement of work, task list, and contractor work plan as approved and attached. The Contractor or any of its subcontractors shall not exceed the ceiling amount provided above in performance of this task order, without prior written approval and an executed modification to this task order.

The effective period of performance of this delivery/task order shall be from the effective date of this order through June 30, 2003, unless otherwise mutually agreed upon and properly modified by the Contracting Officer and Trawick and Associates.

Office of the Chief Information Officer FMEUS2 Statement of Work		
COTR	Task Title	Task Managers
Tom King 305-8999 Jack Bowles 305-8823	Desktop Deployment & Move TO-04/MO-01	Joe Vastola 305-3650

NOTE: Toshia Ross / Demita Durant is the POC's for the CRP Patents Interviewers / Follow Up Techs. . The CRP Patents interviewers will be supervised by Toshia and Demita but will be trained to do interviews and follow up similarly to other CRP/Deploy/Move staff. They will be responsible for the same skills and using the same tools (e.g. interview template versus a paper template).

1. BACKGROUND

This task order includes but is not limited to support of the USPTO desktop lifecycle from installation, configuration, move, deployment, and surplus (including support of the USPTO CPU Replacement Program – CRP). The term desktop includes but is not limited to:

- USPTO approved desktop CPU's, approved and untested laptops /docking stations, barcode readers (BCR) and accompanying peripherals which include desktop and network printers, scanners, keyboards, monitors, scan guns, and other equipment common to the PTO environment. (see 2.18 for more detail on untested laptops).
- USPTO approved desktop workstation operating systems; USPTO approved desktop COTS software and desktop AIS.

Also included are the desktop move and surplus support requirements of miscellaneous USPTO hardware. For example, scanners, modems, LAN probes, routers, hubs, stand-alone servers, DVD towers, jukeboxes, fax machines and convenience copiers (e.g. copiers not connected to a desktop), etc.

Period of performance for this task order is from 2/1/03 to 6/30/03.

2. STATEMENT OF WORK REQUIREMENTS

1. Contractors shall abide by all OCIO Task Manager Directives, Service Level Agreements (SLA), Operational Support Plans and Technical Notes.
2. Contractor shall provide support from 8:00 AM to 6:00 PM local time, Monday through Friday (excluding federal holidays) unless otherwise indicated in this task order (i.e. #30). If a move of 5 desktops or less is scheduled prior to 8:00 AM, contractor shall accommodate the move.
3. Contractor shall maintain a minimum 95% customer satisfaction rating at all times. This translates to Contractor receiving no more than 5% "re-opened" and "unsatisfactory" ratings. Ratings will be measured through the Customer Quality Check process. The rating levels given during the quality checks are outstanding, very good, satisfactory, unsatisfactory and re-open.
4. Whenever working on desktop equipment, contractor shall use a grounding strap to protect the equipment from Electrostatic Discharge (ESD) damage. The grounding strap should conform to the American National Standards Institute (ANSI) standards in regard to EOS/ESD Grounding. The strap should be tested for functionality on a regular basis (daily testing is recommended). In addition to the strap, all electronic components should always be stored in enclosed anti-static bags when not being handled.

5. Any desktop, peripheral or component moved, delivered or installed into service by Contractor shall be fully functional. If replacing a desktop, peripheral or component, replacement must be equivalent or of better performance. If the customer has data files, documents, or other files on the desktop hardware, contractor shall ensure that such files (when not damaged) are transferred to the replacement computer.
6. Any desktop, peripheral or component moved, delivered or installed into service by Contractor shall be locked down as required.
7. Contractor shall report any vandalism, theft or damage to desktop equipment that they are notified of or are witnesses to, to USPTO Security and task manager immediately.
8. Contractor shall perform a Root Cause Analysis (RCA) for resolved problems when requested by the Task Manager.
9. Contractor shall be responsible for resolving problems associated with the CPU replacements / deployments / moves. Contractor shall respond to 95% of problems within two (2) hours of receipt of problem ticket. A response is defined as speaking to the customer, leaving a voice mail message for the customer, sending an email message to the customer or leaving a work service form at the customer's site. Contractor shall resolve/circumvent 95% of problems within four (4) hours of receipt of problem ticket. These commitments apply to all problems assigned to the Contractor, unless otherwise stipulated in this Task Order (TO) or Service Level Agreements.
10. Contractor shall create and update a change record (e.g. in EAMS) for each user installation / replacement / move / surplus completed if there is not an existing ticket. If the move is for a group of 10 or more desktop hardware units, then the creation of one change record is also acceptable. At the time of resolution of the ticket, the contractor shall attach a summary report of the installation data to the ticket so other support groups will have access to information revolving around the installation / replacement / move / surplus.
11. Contractor shall thoroughly document all work they perform in the appropriate problem/change record. Contractor will update problem/change record after each new status. If contractor is out in the field working on a problem/change record, they shall utilize cell phones to communicate to Contractor teammates to update problem/change records in problem/change record management system (e.g. EAMS) as soon as there is a new status
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15. All hardware and supplies provided under this task order must be approved by USPTO T&E HW / SW.
16. Contractor shall be responsible for the receipt and tracking of all hardware shipped to the Contractor's facility on behalf of the USPTO.
17. Contractor shall use the mobile (Psion) units to record all hardware changes for asset management purposes.
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19. Contractor shall be responsible for requests to lockdown USPTO desktop hardware. These requests shall be treated as problem tickets and shall fall under the 2/4-hour commitment as defined in number nine (9).
20. Contractor shall deploy workstations Monday through Friday of each week at the following rates:
 - 47 Per week (Patents – 40 [at a rate of 8/day], Trademark – 2, OCIO –3; Policy – 1, and OCFO – 1)
 - Workstation consists of CPU, monitor and printer
 - Three (3) Peripheral delivery/set-ups are equivalent to one (1) workstation w/ the exception of network printers, which are equivalent to one (1) workstation.
21. Contractor shall establish an installation date within three (3) days of request receipt and shall commit to a four (4) hour timeslot with customer to complete installation.
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23. Contractor shall remove the old workstation / peripherals at the time of the deployment / replacement.
24. During replacement / deployment, Contractor shall replace all items purchased by customer unless customer requests otherwise. These items include accessories provided in CPU "goodie box." Examples include network cables, speakers, mice, keyboards, etc. All items not used by customer shall be added to spare parts inventory.
25. During deployments, Contractor shall perform hardware/software-related services requested by the customer that require less than 30 minutes to perform. In the event it would take longer, the Contractor will create a change record for the customer in order for a technician to complete the request on a separate visit (e.g. move Jaz drive from customer's old PC to new PC).
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27. Contractor shall support the Patent desktop hardware storage area (Crystal Park 3, 9th floor). This support shall consist of the following:

- Log all hardware as it enters and leaves the storage area.
- Test all hardware as it arrives in the storage area. Label the hardware with a brief description of any problems identified during testing.
- Perform the quarterly asset certification.
- Label, box, and shelve speakers, cables, keyboards, and small peripherals.
- Serve as the point-of-contact for any storage room hardware that needs to be deployed or surplused.
- Remove reusable parts from surplus PCs. These parts may include Matrox video cards, Adaptec SCSI cards, Creative Lab sound cards, Seagate SCSI hard drives, cables, and floppy drives. Record items on surplus report and arrange for surplus spare parts to be added to spare parts inventory. Arrange for the surplus of the PCs.
- Sign in and out lockdown kit items (e.g., locks, cables, brackets, etc.).
- Staff the storage area Monday through Friday, from 8 AM to 5 PM.

28. Contractor shall, on average, move/surplus up to 30 desktop hardware units per day. A unit may be a CPU and all its peripherals or a single stand-alone device, such as a network printer. The number of moves per business area per day is as follows:

- Patents – 19, Trademarks – 5, OCIO – 3, Policy – 1, and OCFO – 2.

29. Contractor shall complete requests to move/surplus ten (10) or fewer desktop hardware units within one (1) day of receipt of request. Exceptions may be made if customer requests a later, specific move/surplus date.

30. Contractor shall complete requests to move/surplus more than ten (10) desktop hardware units within five (5) days of receipt of the request. Exceptions may be made if customer requests a later, specific move/surplus date or if the move/surplus schedule is already fully booked.

31. Contractor shall schedule a four (4) hour timeslot with the customer of a move/surplus. This is to inform the customer as to when they should expect the Contractor to begin and complete move/surplus.

32. Contractor shall do deployments including CPU replacements, moves, and surpluses, as necessary, to the three warehouses listed below:

RTIS Contractor 3443 Carlyn Springs Road Bailey's Crossroad, VA 22041 Telephone: 703 750-9580 POC: Bill Docca	Franconia Warehouse 6808 Loisdale Road Springfield, VA Telephone: 703-924-6058 and 703-924-9382 POC: Duane Davis and Nick Massillon	Fullerton Center (Newington Warehouse) 7401 Fullerton Road Springfield, VA Telephone: 703-644-1700 POC: Jerry Hill
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33. Contractor shall have dedicated technical/customer service follow up staff that will visit each user who had a PC/peripheral replacement/installation/move the previous day. Their responsibility will be to check on how the replacement/installation/move process went, answer any questions, provide information and fix any lingering problem (basically be the customer's personal support team for issues related to the replacement/installation/move). They shall also report back to the contractor management who will report to DSD Task Manager on lessons learned so they can be immediately incorporated in the daily process. If the customer's are unavailable during visits, the contractor shall leave a written message on the purpose of their visit, how they can be reached and indicate they will follow up again the next day. These customers will be revisited for three business days, if there is no response from the customer, the duties of this team shall be complete.

If the customer will be out of the office for an extended period of time after a replacement (e.g. more than 3 days), it is the responsibility of the follow up team specifically to ensure the customer is contacted when they are back in the office to go through this process. Of the technical/customer service follow up staff, two shall be dedicated to Patent only PC / peripheral / software replacements/installations/moves. The Patent support team of SIRA shall supervise these two techs.

34. The contractor shall notify the customer POC of their warehouse equipment delivery (ies) within one business day after the equipment is processed at the warehouse and aid in the coordination of the deployment.
35. Contractor shall retain customer's old PC after a replacement for five (5) business days in the event customer experiences problems that require the old PC to resolve.

3. GOVERNMENT FURNISHED MATERIAL

All software and hardware, Psion units, PTONet connections necessary to complete the installations and the list of CPUs, customers and their locations that need to be replaced for the task order time frame.

4. LEVEL OF EFFORT

No work outside the scope of this Task Order will be performed without the written direction of the COTR. This option covers the period through from 2/1/03 to 6/30/03, however the Government, reserves the right to de-scope this task order at any time. The Government will notify Contractor ten (10) working days prior to termination of the task order.

5. PLACE OF PERFORMANCE

Work shall be performed throughout the various buildings occupied by the USPTO in Crystal City, VA; Springfield, VA; and Bailey's Crossroads, VA and in the contractor-leased facilities in Crystal City and Alexandria, VA.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the USPTO COTR and Task Manager (electronic form preferred).

Daily summary activity report	Update Deployment daily spreadsheet on shared server with all workstation deployments, removals, peripheral delivery/set-ups, and CPU upgrades performed; figures must be broken out by business area (Patents, Trademarks, OCIO, Policy, and OCFO)	By Noon of the following business day
Daily detailed activity report	Update Deployment daily spreadsheet on shared server with all workstation deployments, removals, peripheral delivery/set-ups, and CPU upgrades performed; for each provide DO #, customer POC, location, workstation ID, property custodian, business area (Patents, Trademarks, OCIO, Policy, and OCFO)	By Noon of the following business day
Monthly summary activity report	Report/Graph showing all workstation deployments, removals, peripheral delivery/set-ups, and CPU upgrades performed; figures must be broken out by business area (Patents, Trademarks, OCIO, Policy, and OCFO)	Included in End of Month Report
Surplus Report	Report listing all reusable parts removed from PCs in the Patent storage area. Report includes the CD number of the PC, description of the part (including make/model if appropriate), the date the part was removed, and the date the part was delivered to the Desktop Field Support group.	As directed by DSD
Completed Moves Report	Update Move daily spreadsheet on shared server to include change record number, customer business area (OCIO, Patents,	By COB each day

		Trademarks, OCFO, or Policy), move date, number of workstation moves, number of non-workstation moves, two-stage move (Y/N), number of pieces surplus, # lockdowns only. The report should be sorted and totaled by customer business area. [Note: Workstation denotes a CPU and its peripherals; Non-Workstation denotes individual workstation pieces or network printer, scanner, etc.]	
Monthly summary report	Moves activity	Report/Graph showing all workstation/non-workstation moves performed; figures must be broken out by business area (Patents, Trademarks, OCIO, Policy, and OCFO)	Included in End of Month Report
RCA		Root Cause Analysis reports	Within two days of assignment
Individual Installation Report for EAMS		Report that includes all pertinent data collected by the database for each individual installation that shall be attached to that installation EAMS ticket.	Upon completion of each EAMS ticket for each installation.
Workstation ID -- New, Retired, Recycled		Spreadsheet report identifying all new Workstation ID's used, Workstation ID's retired or recycled as a result of support from any DSD contractor.	By 1pm of the following business day
Problem and Change Records		Contractor shall fully document all customer support related activities in the appropriate problem and change records	Records updates must be made within one hour after the completion of an activity

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task order.

8. TRAWICK RESPONSE

TO-04, February 18, 2003 – June 30, 2003 – Statement of Work for the Desktop Deployments and Moves (DDM) Task – FMEUS2 contract

TRAWICK proposes to perform the work specified in the above Statement of Work for the period February 1, 2003 – June 30, 2003 with the following staffing level:

Labor Category

Quantity

[REDACTED]

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

Project	Labor Category	Qty	Dates and Responsibilities
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[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

In addition, as requested by the COTR, the following dollar amounts were added to the task order to cover special projects.

Description	Req Number	Date of Service	Amount
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Total Special Projects	[REDACTED]	[REDACTED]	\$125,864.32

A. **Resource Summary.** The following table provides a high level summary of all labor hours, labor costs, and ODC costs for period February 1, 2003 – June 30, 2003

	Hours	Cost
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	\$1,055,743.30

B. **Resources by labor category.** The following table provides a detailed breakdown of labor hours and costs per labor category for period February 1, 2003 – June 30, 2003.

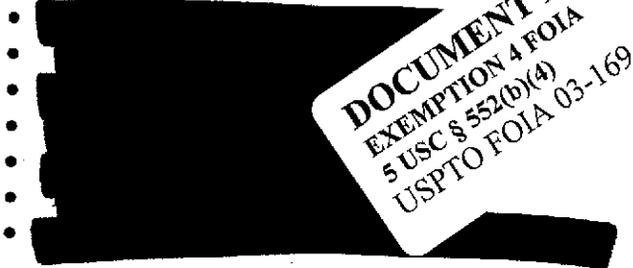
Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	[REDACTED]	[REDACTED]	\$929,878.98

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

TO-04, Revision 01, March 13, 2003 – As requested by the COTR, the following special project was added to this task order. These additional quotes do not change the task order dates of February 18, 2003 – June 30, 2003.



Task Description:



Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
Total				\$11,697.02

A. **Resource Summary.** The following table provides a high level summary of all labor hours, labor costs, and ODC costs for period February 18, 2003 – June 30, 2003

	Hours	Cost
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
TOTAL		\$1,067,017.54

OFFER FOR SUPPLIES OR SERVICES

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

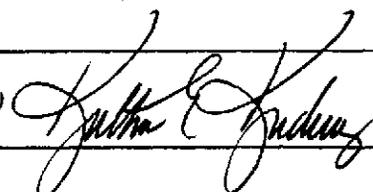
1. DATE OF ORDER 08/23/2002		2. CONTRACT NO. (If any) 50PAPT201025		6. SHIP TO:	
3. ORDER NO. 56PAPT205052		4. REQUISITION/REFERENCE NO. See Lines		a. NAME OF CONSIGNEE See Line Item Detail and Shipping Detail	
5. ISSUING OFFICE (Address correspondence to) Office of Procurement U.S. Patent and Trademark Office 2011 Crystal Drive, Suite 810 Arlington VA 22202				b. STREET ADDRESS	
7. TO: NAME OF CONTRACTOR Carol Trawick COMPANY NAME Trawick and Associates STREET ADDRESS 6900 Wisconsin Avenue, Suite 400 CITY Bethesda e. STATE MD f. ZIP CODE 20815				c. CITY d. STATE e. ZIP CODE	
ACCOUNTING AND APPROPRIATION DATA a Funding Detail				f. SHIP VIA	
8. BUSINESS CLASSIFICATION (Check appropriate box(es)) <input checked="" type="checkbox"/> a. SMALL <input type="checkbox"/> b. OTHER THAN SMALL <input type="checkbox"/> c. DISADVANTAGED <input checked="" type="checkbox"/> d. WOMEN-OWNED				8. TYPE OF ORDER <input type="checkbox"/> a. PURCHASE <input type="checkbox"/> b. DELIVERY - Except for billing instructions on the reverse, this delivery order is subject to instructions contained on this side only of this form and is issued subject to the terms and conditions of the above-numbered contract.	
10. REQUISITIONING OFFICE OCIO/DSM/Office of Acquisition Management				REFERENCE YOUR: Please furnish the following on the terms and conditions specified on both sides of this order and on the attached sheet, if any, including delivery as indicated.	

13. PLACE OF INSPECTION		14. GOVERNMENT B/L NO.		15. DELIVER TO F.O.B. POINT ON OR BEFORE (Date)		16. DISCOUNT TERMS 10 days % 20 days % 30 days % days %	
b. ACCEPTANCE							

17. SCHEDULE (See reverse for Rejections)

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
	SEE LINE ITEM DETAIL					

18. SHIPPING POINT		19. GROSS SHIPPING WEIGHT		20. INVOICE NO.		17(h) TOT. (Cont. pages)
21. MAIL INVOICE TO: (703) 305-8083						
a. NAME U.S. Patent and Trademark Office						17(i) GRAND TOTAL \$6,032,135.56
b. STREET ADDRESS (or P.O. Box) Office of Finance, Box 17						
c. CITY Washington		d. STATE DC	e. ZIP CODE 20231			

UNITED STATES OF AMERICA BY (Signature)  8/23/02			23. NAME (Typed) Kate Kudrewicz TITLE: CONTRACTING/ORDERING OFFICER			
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**ORDER FOR SUPPLIES OR SERVICE
SCHEDULE - CONTINUATION**

PAGE NO.
3 of 31

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER 08/23/2002	CONTRACT NO. 50PAPT201025	ORDER NO. 56PAPT205052
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ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
01	<i>This task order is being issued pursuant to the contract for all tasks necessary during transition. Individual Contractor proposed and Government approved work plans will be provided as attachments to modifications issued against this task order.</i>					
02	Reference Requisition: 192P0230170	0.00		0.000	0.00	
	Reference Requisition: 196P0230081					
	Procurement P.O.C. Kate Kudrewicz (703) 305-8324. COTR, Tom King (703) 305-8999. Contractor P.O.C. Carol Trawick, (301) 654-6088. Fax (301) 656-2251.					

TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 17i) ⇒ \$0.00

Contract Level Funding Summary	Document Number	Title	Page
	J6PAPT205052	FM/EUS2 Transition Task Order	4 of 31

002 - - A - 192100 - - 2570 - - M50039 - 192510 - - - - -

316,570.00

Reference Requisition: 192P0230170

002 - - A - 193100 - - 2570 - - M50023 - 193230 - - - - -

129,070.00

Reference Requisition: 192P0230170

002 - - A - 192100 - - 2570 - - M50006 - 192221 - - - - -

75,880.00

Reference Requisition: 192P0230170

002 - - A - 192100 - - 2570 - - PZLLC1 - 192341 - - - - -

25,600.00

Reference Requisition: 192P0230170

002 - - A - 193100 - - 2570 - - M50011 - 193441 - - - - -

17,580.00

Reference Requisition: 192P0230170

002 - - A - 193100 - - 2570 - - M50015 - 193451 - - - - -

185,000.00

Reference Requisition: 192P0230170

002 - - A - 193100 - - 2570 - - M50015 - 193451 - - - - -

77,000.00

Reference Requisition: 192P0230170

Contract Level Funding Summary	Document Number	Title	Page
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002 - - A - 193100 - - 2570 - - P50013 - 193431 - - - - -
52,380.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - M50017 - 193431 - - - - -
29,340.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - M50013 - 193431 - - - - -
3,740.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - M50013 - 193431 - - - - -
3,740.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZTAC1 - 193220 - - - - -
8,950.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZPWC1 - 193220 - - - - -
8,950.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - DZUPC1 - 193220 - - - - -
8,950.00

Reference Requisition: 196P0230081/0003

Contract Level Funding Summary	Document Number WSPAPT205052	Title FM/EUS2 Transition Task Order	Page 6 of 31
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002 - - A - 193100 - - 2570 - - MZAMC1 - 192510 - - - - -

45,900.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - TZWHC1 - 193220 - - - - -

75,840.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - MZAMC1 - 193220 - - - - -

13,845.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - CZRFC1 - 193220 - - - - -

14,740.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - C50021 - 193230 - - - - -

2,360.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - M50021 - 193230 - - - - -

1,930.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - P50021 - 193230 - - - - -

9,690.00

Reference Requisition: 196P0230081/0003

Contract Level Funding Summary	Document Number	Title	Page
	SAPAPT205052	FM/EUS2 Transition Task Order	7 of 31

2002 - - A - 193100 - - 2570 - - L50021 - 193230 - - - - -

\$11,960.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - T50021 - 193230 - - - - -

\$23,950.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - C50020 - 193230 - - - - -

\$26,440.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - M50020 - 193230 - - - - -

\$32,300.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - L50020 - 193230 - - - - -

\$3,070.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - T50020 - 193230 - - - - -

\$6,140.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - P50023 - 193230 - - - - -

\$4,360.00

Reference Requisition: 196P0230081/0003

Contract Level Funding Summary	Document Number OSPAPT205052	Title FM/EUS2 Transition Task Order	Page 8 of 31
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002 - - A - 193100 - - 2570 - - P50023 - 193230 - - - - -

468,020.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - M50023 - 193230 - - - - -

237,840.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZEBC1 - 193230 - - - - -

1,290.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - LZIAC1 - 193230 - - - - -

1,340.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - P50013 - 193431 - - - - -

5,022.65

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - M50011 - 193431 - - - - -

420.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - M50011 - 193431 - - - - -

420.00

Reference Requisition: 196P0230081/0003

Contract Level Funding Summary	Document Number	Title	Page
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002 - - A - 193100 - - 2570 - - M50011 - 193431 - - - - -

1,420.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - M50014 - 193431 - - - - -

630.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - M50011 - 193431 - - - - -

1,420.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - M50011 - 193431 - - - - -

1,420.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - M50063 - 193431 - - - - -

1,420.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - M50013 - 193431 - - - - -

1,420.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - DZFAC1 - 193431 - - - - -

1,420.00

Reference Requisition: 196P0230081/0003

Contract Level Funding Summary	Document Number 196PAPT205052	Title FM/EUS2 Transition Task Order	Page 10 of 31
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002 - - A - 193100 - - 2570 - - DZIDC1 - 193431 - - - - -

1,420.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - D50013 - 193431 - - - - -

1,420.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - L50013 - 193431 - - - - -

1,420.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZAUC1 - 193431 - - - - -

1,420.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZADC1 - 193431 - - - - -

1,420.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - LZACC1 - 193431 - - - - -

1,420.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZLLC1 - 193431 - - - - -

1,420.00

Reference Requisition: 196P0230081/0003

Contract Level Funding Summary	Document Number JobPAPT205052	Title FM/EUS2 Transition Task Order	Page 11 of 31
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002 - - A - 193100 - - 2570 - - PZPPC1 - 193431 - - - - -

1,420.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZIPC1 - 193431 - - - - -

1,420.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - P50013 - 193431 - - - - -

1,420.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - CZPMC1 - 193431 - - - - -

1,420.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - C50013 - 193431 - - - - -

1,420.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - C50013 - 193431 - - - - -

1,420.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - C50013 - 193431 - - - - -

1,420.00

Reference Requisition: 196P0230081/0003

Contract Level Funding Summary	Document Number	Title	Page
	J6PAPT205052	FM/EUS2 Transition Task Order	12 of 31

002 - - A - 193100 - - 2570 - - TZCRC1 - 193431 - - - - -

\$1,420.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - T50013 - 193431 - - - - -

1,420.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - LZABC1 - 193431 - - - - -

1,420.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZEB1 - 193431 - - - - -

1,800.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - CZFIC1 - 193431 - - - - -

1,800.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - LZIAC1 - 193431 - - - - -

1,800.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - M50013 - 193431 - - - - -

1,850.00

Reference Requisition: 196P0230081/0003

Contract Level Funding Summary	Document Number 06PAPT205052	Title FM/EUS2 Transition Task Order	Page 13 of 31
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002 - - A - 193100 - - 2570 - - M50013 - 193431 - - - - -

2,850.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - DZFAC1 - 193431 - - - - -

2,850.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - DZIDC1 - 193431 - - - - -

2,850.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - LZEDC1 - 193431 - - - - -

2,850.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - LZDMC1 - 193431 - - - - -

2,850.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - P50013 - 193431 - - - - -

2,850.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - P50013 - 193431 - - - - -

2,850.00

Reference Requisition: 196P0230081/0003

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002 - - A - 193100 - - 2570 - - CZPDC1 - 193431 - - - - -

2,850.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - CZEEC1 - 193431 - - - - -

1,850.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - TZMIC1 - 193431 - - - - -

1,850.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - T50013 - 193431 - - - - -

1,850.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZL3C1 - 193431 - - - - -

280.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - TZCRC1 - 193431 - - - - -

280.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZGNC1 - 193431 - - - - -

710.00

Reference Requisition: 196P0230081/0003

Contract Level Funding Summary	Document Number	Title	Page
	6. APT205052	FM/EUS2 Transition Task Order	15 of 31

002 - - A - 193100 - - 2570 - - PZCUC1 - 193431 - - - - -

18,560.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZWTC1 - 193431 - - - - -

9,990.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - D50013 - 193431 - - - - -

20,000.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - P50013 - 193431 - - - - -

1,705.95

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - P50013 - 193431 - - - - -

4,930.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZPAC1 - 193431 - - - - -

1,447.85

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - M50013 - 193431 - - - - -

3,740.00

Reference Requisition: 196P0230081/0003

Contract Level Funding Summary	Document Number 561 APT205052	Title FM/EUS2 Transition Task Order	Page 16 of 31
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002 - - A - 193100 - - 2570 - - LZIAC1 - 193431 - - - - -

3,260.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZT2C1 - 193431 - - - - -

7,140.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - DZNTC1 - 193431 - - - - -

3,920.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - LZFAC1 - 193431 - - - - -

1,920.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - LZACC1 - 193431 - - - - -

,920.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - M50051 - 193431 - - - - -

1,710.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - DZMSC1 - 193431 - - - - -

1,710.00

Reference Requisition: 196P0230081/0003

Contract Level Funding Summary	Document Number 501 APT205052	Title FM/EUS2 Transition Task Order	Page 17 of 31
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002 - - A - 193100 - - 2570 - - P50013 - 193431 - - - - -

10,710.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - D50013 - 193431 - - - - -

10,710.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - LZEDC1 - 193431 - - - - -

10,710.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - CZPOC1 - 193431 - - - - -

0,710.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - MZAMC1 - 193431 - - - - -

1,420.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZRIC1 - 193431 - - - - -

2,130.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - MZNNC1 - 193431 - - - - -

4,280.00

Reference Requisition: 196P0230081/0003

Contract Level Funding Summary	Document Number 501 APT205052	Title FM/EUS2 Transition Task Order	Page 18 of 31
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002 - - A - 193100 - - 2570 - - TZTRC1 - 193431 - - - - -

14,280.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - MZECC1 - 193431 - - - - -

17,090.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - M50013 - 193431 - - - - -

7,850.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - M50063 - 193431 - - - - -

7,850.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - LZABC1 - 193431 - - - - -

7,850.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZGNC1 - 193431 - - - - -

1,990.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - MZMSC1 - 193431 - - - - -

1,700.00

Reference Requisition: 196P0230081/0003

Contract Level Funding Summary	Element Number 500 APT205052	Title FM/EUS2 Transition Task Order	Page 19 of 31
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002 - - A - 193100 - - 2570 - - LZDMC1 - 193431 - - - - -

22,130.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - CZHRC1 - 193431 - - - - -

23,560.00

Reference Requisition: 196P0230081/0003

002 - - A - 192100 - - 2570 - - M50006 - 192221 - - - - -

8,420.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - DZIDC1 - 193431 - - - - -

1,074.63

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - TZT2C1 - 193431 - - - - -

7,840.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - P50013 - 193431 - - - - -

1,000.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - MZFWC1 - 193431 - - - - -

1,620.00

Reference Requisition: 196P0230081/0003

Contract Level Funding Summary	Document Number 50. APT205052	Title FM/EUS2 Transition Task Order	Page 20 of 31
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2002 - - A - 193100 - - 2570 - - CZRGC1 - 193431 - - - - -

34,980.00

Reference Requisition: 196P0230081/0003

2002 - - A - 193100 - - 2570 - - PZPAC1 - 193431 - - - - -

35,700.00

Reference Requisition: 196P0230081/0003

2002 - - A - 193100 - - 2570 - - P50013 - 193431 - - - - -

37,120.00

Reference Requisition: 196P0230081/0003

2002 - - A - 193100 - - 2570 - - P50013 - 193431 - - - - -

39,250.00

Reference Requisition: 196P0230081/0003

2002 - - A - 193100 - - 2570 - - TZNTC1 - 193431 - - - - -

1,141.56

Reference Requisition: 196P0230081/0003

2002 - - A - 193100 - - 2570 - - M50023 - 193431 - - - - -

3,550.00

Reference Requisition: 196P0230081/0003

2002 - - A - 193100 - - 2570 - - M50013 - 193431 - - - - -

7,120.00

Reference Requisition: 196P0230081/0003

Contract Level Funding Summary	Contract Number 56PAPT205052	Title FM/EUS2 Transition Task Order	Page 21 of 31
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002 - - A - 193100 - - 2570 - - PZIQC1 - 193431 - - - - -

67,110.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - P50013 - 193431 - - - - -

55,670.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - M50011 - 193441 - - - - -

26,490.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - M50010 - 193441 - - - - -

9,900.09

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - M50010 - 193441 - - - - -

0,000.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - M50011 - 193441 - - - - -

3,461.67

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZRIC1 - 193220 - - - - -

010.00

Reference Requisition: 196P0230081/0003

Contract Level Funding Summary	Element Number 50rAPT205052	Title FM/EUS2 Transition Task Order	Page 22 of 31
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002 - - A - 193100 - - 2570 - - TZUPC1 - 193220 - - - - -

1,010.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - TZTRC1 - 193220 - - - - -

1,010.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - TZNTC1 - 193220 - - - - -

,010.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - CZJRC1 - 193220 - - - - -

,010.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZOAC1 - 193220 - - - - -

,020.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZPAC1 - 193220 - - - - -

020.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZOXC1 - 193220 - - - - -

020.00

Reference Requisition: 196P0230081/0003

Contract Level Funding Summary	Element Number 567APT205052	Title FM/EUS2 Transition Task Order	Page 23 of 31
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002 - - A - 193100 - - 2570 - - PZAUC1 - 193220 - - - - -

3,020.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZCTC1 - 193220 - - - - -

3,020.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - TZCRC1 - 193220 - - - - -

3,020.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZWTC1 - 193220 - - - - -

3,020.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZGNC1 - 193220 - - - - -

3,020.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZADC1 - 193220 - - - - -

3,020.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - TZTXC1 - 193220 - - - - -

3,020.00

Reference Requisition: 196P0230081/0003

Contract Level Funding Summary	Document Number 501 APT205052	Title FM/EUS2 Transition Task Order	Page 24 of 31
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002 - - A - 193100 - - 2570 - - TZDIC1 - 193220 - - - - -

3,020.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - DZOEC1 - 193220 - - - - -

3,020.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - DZIDC1 - 193220 - - - - -

3,020.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - CZRGC1 - 193220 - - - - -

3,040.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - CZPMC1 - 193220 - - - - -

3,040.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - CZHRC1 - 193220 - - - - -

3,040.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZPPC1 - 193220 - - - - -

3,040.00

Reference Requisition: 196P0230081/0003

**Contract Level
Funding Summary**

Document Number
5br APT205052

Title
FM/EUS2 Transition Task Order

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25 of 31

2002 - - A - 193100 - - 2570 - - TZTMC1 - 193220 - - - - -

15,040.00

Reference Requisition: 196P0230081/0003

2002 - - A - 193100 - - 2570 - - PZESC1 - 193220 - - - - -

15,040.00

Reference Requisition: 196P0230081/0003

2002 - - A - 193100 - - 2570 - - PZSGC1 - 193220 - - - - -

15,040.00

Reference Requisition: 196P0230081/0003

2002 - - A - 193100 - - 2570 - - PZPPC1 - 193220 - - - - -

13,040.00

Reference Requisition: 196P0230081/0003

2002 - - A - 193100 - - 2570 - - PZPAC1 - 193220 - - - - -

13,040.00

Reference Requisition: 196P0230081/0003

2002 - - A - 193100 - - 2570 - - PZOXC1 - 193220 - - - - -

13,040.00

Reference Requisition: 196P0230081/0003

2002 - - A - 193100 - - 2570 - - TZDIC1 - 193220 - - - - -

13,040.00

Reference Requisition: 196P0230081/0003

Contract Level Funding Summary	Document Number 50. APT205052	Title FM/EUS2 Transition Task Order	Page 26 of 31
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002 - - A - 193100 - - 2570 - - CZPDC1 - 193220 - - - - -

6,090.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - CZJRC1 - 193220 - - - - -

5,090.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZOAC1 - 193220 - - - - -

10,080.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZASC1 - 193220 - - - - -

10,080.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZCTC1 - 193220 - - - - -

10,080.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - DZIDC1 - 193220 - - - - -

10,080.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZESC1 - 193220 - - - - -

10,080.00

Reference Requisition: 196P0230081/0003

Contract Level Funding Summary	Document Number 56r APT205052	Title FM/EUS2 Transition Task Order	Page 27 of 31
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2002 - - A - 193100 - - 2570 - - CZRFC1 - 193220 - - - - -

\$10,170.00

Reference Requisition: 196P0230081/0003

2002 - - A - 193100 - - 2570 - - PZSSC1 - 193220 - - - - -

\$18,950.00

Reference Requisition: 196P0230081/0003

2002 - - A - 193100 - - 2570 - - PZCRC1 - 193220 - - - - -

\$37,920.00

Reference Requisition: 196P0230081/0003

2002 - - A - 193100 - - 2570 - - M50021 - 193220 - - - - -

\$61,000.00

Reference Requisition: 196P0230081/0003

2002 - - A - 193100 - - 2570 - - LZDMC1 - 193230 - - - - -

\$1,340.00

Reference Requisition: 196P0230081/0003

2002 - - A - 193100 - - 2570 - - CZHRC1 - 193230 - - - - -

\$4,070.00

Reference Requisition: 196P0230081/0003

2002 - - A - 193100 - - 2570 - - MZAQC1 - 193230 - - - - -

\$1,350.00

Reference Requisition: 196P0230081/0003

Contract Level Funding Summary	Document Number Doc. APT205052	Title FM/EUS2 Transition Task Order	Page 28 of 31
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002 - - A - 193100 - - 2570 - - CZEEC1 - 193230 - - - - -

2,710.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - CZFIC1 - 193230 - - - - -

3,790.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - LZACC1 - 193230 - - - - -

2,690.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - LZEDC1 - 193230 - - - - -

1,390.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - PZGNC1 - 193431 - - - - -

2,130.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - T50013 - 193431 - - - - -

6,400.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - D50096 - 193250 - - - - -

63,410.00

Reference Requisition: 196P0230081/0003

Contract Level Funding Summary	Element Number 507-APT205052	Title FM/EUS2 Transition Task Order	Page 29 of 31
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002 - - A - 192100 - - 2570 - - PZLLC1 - 192341 - - - - -

161,860.00

Reference Requisition: 196P0230081/0003

002 - - A - 191100 - - 2570 - - M50061 - 192321 - - - - -

56,120.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - TZCRC1 - 193220 - - - - -

8,550.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - C50013 - 193431 - - - - -

7,140.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - M50025 - 193240 - - - - -

243,910.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - M50018 - 193220 - - - - -

168,700.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - M50048 - 193431 - - - - -

10,256.16

Reference Requisition: 196P0230081/0003

Contract Level Funding Summary	Funding Number 56, APT205052	Title FM/EUS2 Transition Task Order	Page 30 of 31
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002 - - A - 193100 - - 2570 - - M50023 - 193230 - - - - -

425,120.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - M50023 - 193230 - - - - -

206,450.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - P50020 - 193230 - - - - -

20,990.00

Reference Requisition: 196P0230081/0003

002 - - A - 193100 - - 2570 - - P50021 - 193230 - - - - -

4,230.00

Reference Requisition: 196P0230081/0003

002 - - A - 192100 - - 2570 - - T50013 - 193431 - - - - -

5,000.00

Reference Requisition: 196P0230081/0003

Total Funding: \$6,032,135.56

Address Detail

Tr
 Fmr US2 Transition Task Order

Doc: t Number
 56PAF 205052

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 31 of 31

Shipping Addresses

Code	Detail	Code	Detail
0001	Org: Addr: Attn: Phone: Fax:	0002	Org: Addr: Arlington VA 22202 Attn: No Contacts Identified Phone: Fax:

Invoice Addresses

Code	Detail
	Org: Addr: Washington DC 20231 Attn: (703) 305-8083 Phone: Fax:

Requisitioning Office Addresses

Code	Detail
	Org: Addr: ARLINGTON VA 22202 Attn: Audrey Jackson Phone: Fax:

AMENDMENT/MODIFICATION NO. 0001 3. EFFECTIVE DATE 09/05/2002 4. REQUISITION/PURCHASE REQ. NO. See Lines 5. PROJECT NO. (If applicable)

ISSUED BY CODE 17 7. ADMINISTERED BY (If other than Item 6) CODE
 Office of Procurement
 U.S. Patent and Trademark Office, 2011 Crystal Drive, Suite 810
 Arlington, VA 22202

NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and Zip Code)
 Carol Trawick
 Trawick and Associates
 6900 Wisconsin Avenue, Suite 400
 Bethesda, MD 20815
 ODE * FACILITY CODE
 9A. AMENDMENT OF SOLICITATION NO.
 9B. DATED (SEE ITEM 11)
 (X) 10A. MODIFICATION OF CONTRACT/ORDER NO. 50PAPT201025 / 56PAPT205052
 (X) 10B. DATED (SEE ITEM 13) 08/23/2002

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers is extended, is not extended.
 Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:
 (a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

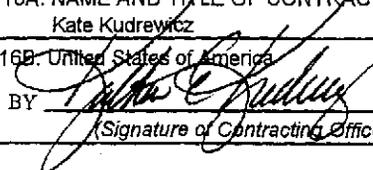
ACCOUNTING AND APPROPRIATION DATA (If required)
 See Funding Detail

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE
 A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
 B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
 C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
 D. OTHER (Specify type of modification and authority)
 Task Order clause H.17 of the contract.

IMPORTANT: Contractor is not, is required to sign this document and return _____ copies to the issuing office.

DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)
 Attached.

As provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.
 NAME AND TITLE OF SIGNER (Type or print) 16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print)
 Kate Kudrewicz
 CONTRACTOR/OFFEROR 15C. DATE SIGNED 16B. United States of America 16C. DATE SIGNED
 BY  09/05/2002
 (Signature of person authorized to sign) (Signature of Contracting Officer)

Line Item Summary	Document Number DORAPT205052/0001	Title FM/EUS2 Proj. Mgmt. IO-01	Page 2 of 4
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Line Item Number	Description	Delivery Date (Start date to End date)	Quantity	Unit of Issue	Unit Price	Total Cost
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This is task order 56-PAPT-2-05052/0001 for Project Management. necessary during the transition period. The Contractor proposed and Government approved work plan is attached.

No Changed Line Item Fields

Previous Total: \$6,032,135.56
Modification Total: \$0.00
Grand Total: \$6,032,135.56

Procurement P.O.C. Kate Kudrewicz (703) 305-8324. COTR, Tom King (703) 305-8999. Contractor P.O.C. Carol Trawick, (301) 654-6088. Fax (301) 656-2251.

Address Detail

EUS2 Proj. Mgmt. TO-01

Document Number

561-APT205052/0001

Page

3 of 4

Shipping Addresses

Code	Detail	Code	Detail
0001	Org: Addr: Attn: Phone: Fax:	0002	Org: Addr: Arlington VA 22202 Attn: No Contacts Identified Phone: Fax:

Invoice Addresses

Code	Detail
	Org: Addr: Washington DC 20231 Attn: (703) 305-8083 Phone: Fax:

Task Order 56-PAPT-2-05052
Contract 50-PAPT-2-01025

Modification MO01

The purpose of this task order modification to task order number 56-PAPT-2-05052/0001 is to incorporate the Project Management Task into the original Transition Period Task. Accordingly, said task order is hereby modified as follows:

1. Modify the original task order to incorporate the Project Management Task. The work plan for this task is provided as an attachment to this task order modification. The ceiling price of the Project Management Task TO-01 is \$197,854.26.
2. The funding provided on the original Transition Task is hereby reduced from \$6,032,135.56 by \$197,854.26 thereby reducing the available funding to \$5,834,281.30.

Except as provided herein, all other terms and conditions of the contract remain unchanged and in full force and effect.

Office of the Chief Information Officer FMEUS2 Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999 Jack Bowles 305-8823	Project Management TO-01	Tom King 305-8999 Jack Bowles 305-8823

1. BACKGROUND

The objective of this task order is to provide technical project management of the United States Patent and Trademark Office (USPTO) Facilities Management/End-User Support (FMEUS2) contract. In conjunction with this task order the FMEUS2 Contractor should expect to provide support to the Office of the Chief Information Officer (OCIO) of the USPTO in the following areas:

- Project Management and Administrative Support.
- Task Order Preparation and Modification Assistance.
- Contract Financial Management.
- Technical and Management Advice.

2. STATEMENT OF WORK

1. The Contractor shall provide support to the USPTO in the area of Project Management and Administrative Support. This includes all activities associated with the Contractor's own day-to-day project management and administration responsibilities. Sample activities include project-wide planning, staffing, scheduling, coordination, integration, oversight, progress monitoring/reporting, subcontractor liaison, cost control, payment administration, productivity/quality control, continuous process improvement, meetings/briefings/presentations, and administrative support (including general correspondence; property, facility, and records management; contract management and administration; and administrative/clerical/secretarial support (e.g. typing, spreadsheets, project schedules, data base management etc.)).
2. In conjunction with the progress monitoring/ reporting requirement, the Contractor shall regularly prepare and submit to the USPTO, by the tenth (10th) day of each month, a Monthly Progress Report. This report shall detail the Contractor's progress, problems, accomplishments, and deliverables during the subject reporting period; activities planned for the next reporting period; anticipated problems; and planned vs. actual monthly as well as cumulative staff hour and cost information. The Contractor should also expect to prepare and present to the USPTO, at a time to be designated by USPTO, a Monthly Program Review Briefing. The scope of this briefing shall include key activities, planned work, deliverable status, issues, and financial status for each FMEUS2 task order.
3. The Contractor shall provide support to the USPTO in the area of Task Order Preparation and Modification Assistance. This includes Contractor support and assistance in the preparation of new task orders (including Statement of Work preparation) as well as associated costing, modification (including the preparation of Resource Estimates), negotiation, and oversight.

4. The Contractor shall provide support to the USPTO in the area of Technical and Management Advice. This includes review and comment on key USPTO and other contractor documents as well as technical and programmatic issues as requested by the USPTO or determined necessary by the Contractor.
5. The Contractor shall notify the Contracting Officer (CO) and the Contracting Officer's Technical Representative (COTR) in writing whenever the expected costs incurred in the next sixty (60) days plus costs already incurred will exceed seventy-five percent (75%) of the total estimated cost of a task.
6. The Contractor shall prepare financial information as required by the USPTO (See deliverables).

3. GOVERNMENT FURNISHED MATERIAL

None.

4. LEVEL OF EFFORT

This option covers the period from August 12, 2002 through January 31, 2003, however the Government reserves the right to de-scope this task order at any time. The Government will notify Contractor ten (10) working days prior to termination of the task order.

5. PLACE OF PERFORMANCE

Work will be performed in Crystal City, VA and in the Contractor's leased facilities in Crystal City, Alexandria, VA and Bethesda, MD.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the COTR (electronic form preferred).

Deliverable	Due Date
Progress Reports	10 th day of each Month
File for Robbins-Gioia CAT Updates (USPTO to provide format)	15 th day of each Month
Update USPTO Actual vs. Plan Spreadsheet	3 days after receipt of invoice
Government Furnished Equipment (GFE) List	1 st day of each quarter (Oct, Jan, Apr, Jun)
Asset Discrepancy Report	Daily
Task Orders/Modifications/Resource Estimates	As Required
Cost Proposals/Invoices	As Required
Negotiations/Meetings/Briefings/Presentations	As Required
Administrative Correspondence	As Required
Review and Comment on Key Documents	As Required
Technical and Programmatic Issue Resolution	As Required
Technical Reports/Work Papers/Letters	As Required

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task order.

7. TRAWICK RESPONSE

TO-01, August 12, 2002 – January 31, 2002 – Initial Statement of Work for the FMEUS 2 contract Project Management Task

Trawick & Associates proposes to perform the work outlined in the above Statement of Work with the following staffing level.

Function	Labor Category	Qty	Duties and Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

A. **Resource Summary.** The following table provides a high level summary of all labor hours, labor costs, and ODC costs:

	Hours	Cost
Labor		
ODCs		
TOTAL		\$197,854.26

B. **Resources by labor category.** The following table provides a detailed breakdown of labor hours and costs per labor category:

Labor Category	Hours	Rate	
TOTAL		N/A	\$197,854.26

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

2. AMENDMENT/MODIFICATION NO. 0003	3. EFFECTIVE DATE 09/27/2002	4. REQUISITION/PURCHASE REQ. NO. See Lines	5. PROJECT NO. (if applicable)
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6. ISSUED BY Office of Procurement U.S. Patent and Trademark Office, 2011 Crystal Drive, Suite 810 Arlington, VA 22202	CODE 17	7. ADMINISTERED BY (if other than Item 6)	CODE
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8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and Zip Code) Carol Trawick Trawick and Associates 6900 Wisconsin Avenue, Suite 400 Bethesda, MD 20815	9A. AMENDMENT OF SOLICITATION NO.
	9B. DATED (SEE ITEM 11)
	(X) 10A. MODIFICATION OF CONTRACT/ORDER NO. 50PAPT201025 / 56PAPT205052
	(X) 10B. DATED (SEE ITEM 13) 08/23/2002

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers is extended, is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:
 (a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. **FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER.** If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

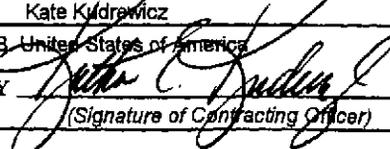
2. ACCOUNTING AND APPROPRIATION DATA (If required)
See Funding Detail

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

<input type="checkbox"/>	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
<input type="checkbox"/>	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
<input type="checkbox"/>	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
<input checked="" type="checkbox"/>	D. OTHER (Specify type of modification and authority) Task Order Clause of the Contract

IMPORTANT: Contractor is not, is required to sign this document and return _____ copies to the issuing office.

DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)
Additional funding and work plans as attached.

NAME AND TITLE OF SIGNER (Type or print)		16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) Kate Kudrawicz	
CONTRACTOR/OFFEROR	15C. DATE SIGNED	16B. United States of America BY  (Signature of Contracting Officer)	16C. DATE SIGNED 09/27/2002
(Signature of person authorized to sign)			

Line Item Summary	Document Number 56PAPT205052/0003	Title FM/EUS2 Transition 10 Mod 3	Page 2 of 9
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FYs	Fund	Budget Org	Sub	Object Class	Sub	Program	Cost Org	Sub	Proj/Job No.	Sub	Reporting Category
Division		Closed FYs		Cancelled Fund							

Line Item Number	Description	Delivery Date (Start date to End date)	Quantity	Unit of Issue	Unit Price	Total Cost
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This is task order 56-PAPT-2-05052/0002 for a deobligation of funding applied against the Transition Task.

No Changed Line Item Fields

Previous Total: \$4,789,522.36
Modification Total: \$464,728.74
Grand Total: \$5,254,251.10

Procurement P.O.C. Kate Kudrewicz (703) 305-8324. COTR, Tom King (703) 305-8999. Contractor P.O.C. Carol Trawick, (301) 654-6088. Fax (301) 656-2251.

Contract Level Funding Summary	Document Number 56PAPT205052/0003	Title FM/EUS2 Transition TL word 3	Page 3 of 9
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<u>Funding Strip Code</u>	<u>Change in Funded Amount</u>
2002 - - A - 184100 - - 2605 - - 015603 - 184100 - - - - -	\$949.24
Reference Requisition: 183P0230197	
2002 - - A - 189100 - - 2605 - - 015301 - 189100 - - - - -	\$499.60
Reference Requisition: 183P0230197	
2002 - - A - 180100 - - 2605 - - 011090 - 180100 - - - - -	\$149.88
Reference Requisition: 183P0230197	
2002 - - A - 188110 - - 2605 - - 330189 - 188110 - - - - -	\$3,372.30
Reference Requisition: 183P0230197	
2002 - - A - 182100 - - 2605 - - 330170 - 182100 - - - - -	\$849.32
Reference Requisition: 183P0230197	
2002 - - A - 183100 - - 2605 - - 010304 - 183100 - - - - -	\$5,245.80
Reference Requisition: 183P0230197	
2002 - - A - 187100 - - 2605 - - 011400 - 187100 - - - - -	\$3,197.44
Reference Requisition: 183P0230197	

Contract Level Funding Summary	ment Number 56PAPT205052/0003	Title FM/EUS2 Transition T.C. mod 3	Page 4 of 9
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<u>Funding Strip Code</u>	<u>Change in Funded Amount</u>
2002 - - A - 186100 - - 2605 - - 010304 - 186100 - - - - -	\$524.58

Reference Requisition: 183P0230197

2002 - - A - 141100 - - 2605 - - 010304 - 141100 - - - - -	\$1,174.06
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Reference Requisition: 183P0230197

2002 - - A - 129100 - - 2605 - - 010304 - 129100 - - - - -	\$649.48
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Reference Requisition: 183P0230197

2002 - - A - 123100 - - 2605 - - 010304 - 123100 - - - - -	\$2,223.22
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Reference Requisition: 183P0230197

2002 - - A - 124100 - - 2605 - - 010304 - 124100 - - - - -	\$3,447.24
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Reference Requisition: 183P0230197

2002 - - A - 125100 - - 2605 - - 010304 - 125100 - - - - -	\$399.68
------------------------------------------------------------	----------

Reference Requisition: 183P0230197

2002 - - A - 121100 - - 2605 - - 010304 - 121100 - - - - -	\$899.28
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Reference Requisition: 183P0230197

Contract Level Funding Summary	Document Number 56PAPT205052/0003	Title FM/EUS2 Transition TC mod 3	Page 5 of 9
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<u>Funding Strip Code</u>	<u>Change in Funded Amount</u>
2002 - - A - 131100 - - 2605 - - 301000 - 131100 - - - - -	\$26,703.62

Reference Requisition: 183P0230197

2002 - - A - 114100 - - 2605 - - 010301 - 114100 - - - - -	\$7,868.70
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Reference Requisition: 183P0230197

2002 - - A - 111100 - - 2605 - - 011090 - 111100 - - - - -	\$724.42
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Reference Requisition: 183P0230197

2002 - - A - 112100 - - 2605 - - 011011 - 112100 - - - - -	\$399.68
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Reference Requisition: 183P0230197

2002 - - A - 150997 - - 2570 - - T31375 - 164100 - - - - -	\$95,000.00
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Reference Requisition: 150P0230192

2002 - - A - 188270 - - 2570 - - 010304 - 188270 - - - - -	\$61,951.20
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Reference Requisition: 188P0230196

2002 - - A - 188270 - - 2570 - - 010304 - 188270 - - - - -	\$97,500.00
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Reference Requisition: 188P0230196

Contract Level Funding Summary	Document Number 56PAPT205052/0003	Title FM/EUS2 Transition TO word 3	Page 6 of 9
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<u>Funding Strip Code</u>	<u>Change in Funded Amount</u>
2002 - - A - 150997 - - 2570 - - C25199 - 150997 - - - - -	\$59,208.96

Reference Requisition: 150P0230200

2002 - - A - 150997 - - 2570 - - C25225 - 150997 - - - - -	\$91,791.04
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Reference Requisition: 150P0230200

Address DetailT
FM/EUS2 Transition TO Mod 3Document Number
56PA...205052/0003Page
7 of 9**Shipping Addresses**

Code	Detail	Code	Detail
0001	Org: Addr: Attn: Phone: Fax:	0002	Org: Addr: Arlington VA 22202 Attn: No Contacts Identified Phone: Fax:

Invoice Addresses

Code	Detail
	Org: Addr: Washington DC 20231 Attn: (703) 305-8083 Phone: Fax:

The purpose of this task order modification to task order number 56-PAPT-2-05052/0002 is to incorporate the following work plans in the original Transition Period Task. Accordingly, said task order is hereby modified as follows:

1. Modify the original task order to incorporate Advanced Problem Resolution Support Task (TO-02), Data Maintenance Support (TO-05), DBA Support (TO-06), Facilities Management Support (TO-07), Desktop Field Support (TO-08), Help Desk (TO-09), IEB and IEB T&E Hardware Support (TO-10), Network Operations (TO-12), NT Operating Systems Support (TO-13), User ID and Password Administration (TO-14), Technical Writing/Document Development (TO-15), UNIX Operating Systems Support, (TO-16), Hardware Maintenance Consolidation (TO-17) and Warehouse Operations (TO-18). The work plans for these tasks are provided as an attachment to this task order modification. The ceiling price of each of the task order is as follows:

Advanced Problem Resolution Support Task (TO-02)	\$ 320,095.68
Data Maintenance Support (TO-05)	\$ 119,427.84
DBA Support (TO-06)	\$ 134,807.04
Facilities Management Support (TO-07)	\$ 15,202.56
Desktop Field Support (TO-08)	\$1,313,987.76
Help Desk (TO-09)	\$ 609,910.08
IEB and IEB T&E Hardware Support (TO-10)	\$ 74,415.36
Network Operations (TO-12)	\$ 777,473.38
NT Operating Systems Support (TO-13)	\$ 123,484.32
User ID and Password Administration (TO-14)	\$ 141,657.60
Technical Writing/Document Development (TO-15)	\$ 55,994.88
UNIX Operating Systems Support, (TO-16)	\$ 77,235.84
Hardware Maintenance Consolidation (TO-17)	\$1,071,362.70
Warehouse Operations (TO-18)	<u>\$ 177,864.40</u>
	\$5,012,919.43

2. The funding provided on the original Transition Task is hereby increased from \$4,789,522.36, by \$464,728.74 to a new total of \$ 5,254,251.10.
3. The available ceiling remaining on the Transition Task is hereby reduced from \$5,056,396.84, by \$5,012,919.43 to a new total of \$ 43,477.41.

Task Order 56-PAPT-2-05052
Contract 50-PAPT-2-01025

Modification MO03

4. The period of performance of each of the task orders listed above is estimated to end on November 8, 2002. However, if the ceiling price of the task order will be exceeded prior to November 8, 2002, the Contractor is only authorized to work up to the ceiling price of the task order.

Except as provided herein, all other terms and conditions of the contract remain unchanged and in full force and effect.

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

1. CONTRACT ID CODE _____ Page 1 of 12

2. AMENDMENT/MODIFICATION NO. 0004 3. EFFECTIVE DATE 10/24/2002 4. REQUISITION/PURCHASE REQ. NO. See Lines 5. PROJECT NO. (If applicable)

6. ADMINISTERED BY CODE 17 7. ADMINISTERED BY (If other than Item 6) CODE _____
 Procurement Agent and Trademark Office, 2011 Crystal Drive, Suite 810
 Arlington, VA 22202

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and Zip Code)
 Carol Trawick
 Trawick and Associates
 6900 Wisconsin Avenue, Suite 400
 Bethesda, MD 20815

9A. AMENDMENT OF SOLICITATION NO. _____
 9B. DATED (SEE ITEM 11) _____
 (X) 10A. MODIFICATION OF CONTRACT/ORDER NO. 50PAPT201025 / 56PAPT205052
 (X) 10B. DATED (SEE ITEM 13) 08/23/2002

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers is extended, is not extended.
 Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:
 (a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

2. ACCOUNTING AND APPROPRIATION DATA (If required)

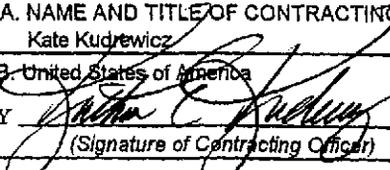
See Funding Detail

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

- A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
- B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
- C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
- D. OTHER (Specify type of modification and authority)
 Task Order Clause of the Contract

IMPORTANT: Contractor is not, is required to sign this document and return _____ copies to the issuing office.

DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)
 Additional funding and approved work plans as attached.

NAME AND TITLE OF SIGNER (Type or print) _____ 16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print)
 Kate Kudrewicz
 CONTRACTOR/OFFEROR _____ 15C. DATE SIGNED _____ 16B. United States of America
 BY  16C. DATE SIGNED
 10/24/2002
 (Signature of person authorized to sign) _____ (Signature of Contracting Officer)

Line Item Summary

Document Number PAPT205052/0004	Title FM/EUS2 Transition... Mod 4	Page 2 of 12
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FYs	Fund	Budget Org	Sub	Object Class	Sub	Program	Cost Org	Sub	Proj/Job No.	Sub	Reporting Category
Division		Closed FYs		Cancelled Fund							

Line Item Number	Description	Delivery Date (Start date to End date)	Quantity	Unit of Issue	Unit Price	Total Cost
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This is task order 56-PAPT-2-05052/0004 obligation of additional funding applied against the Transition Task.

No Changed Line Item Fields

Previous Total: \$5,254,251.10
Modification Total: \$5,566,946.17
Grand Total: \$10,821,197.27

Procurement P.O.C. Kate Kudrewicz (703) 305-8324. COTR, Tom King (703) 305-8999. Contractor P.O.C. Carol Trawick, (301) 654-6088. Fax (301) 656-2251.

Contract Level Funding Summary	Document Number JOPAPT205052/0004	Title FM/EUS2 Transition Mod 4	Page 3 of 12
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<u>Funding Strip Code</u>	<u>Change in Funded Amount</u>
- A - 193100 - - 2570 - - M50015 - 193451 - - - - NONCOMP - - - -	\$64,530.34
Reference Requisition: 193P0330001	
2003 - - A - 193100 - - 2570 - - C50105 - 193230 - - - - NONCOMP - - - -	\$8,240.00
Reference Requisition: 193P0330006	
2003 - - A - 193100 - - 2570 - - M50105 - 193230 - - - - NONCOMP - - - -	\$14,910.00
Reference Requisition: 193P0330006	
2003 - - A - 193100 - - 2570 - - P50105 - 193230 - - - - NONCOMP - - - -	\$76,960.00
Reference Requisition: 193P0330006	
2003 - - A - 193100 - - 2570 - - L50105 - 193230 - - - - NONCOMP - - - -	\$7,790.00
Reference Requisition: 193P0330006	
2003 - - A - 193100 - - 2570 - - T50105 - 193230 - - - - NONCOMP - - - -	\$11,020.00
Reference Requisition: 193P0330006	
2003 - - A - 193100 - - 2570 - - M50105 - 193230 - - - - NONCOMP - - - -	\$102,830.00
Reference Requisition: 193P0330006	

Contract Level Funding Summary	Document Number PAPT205052/0004	Title FM/EUS2 Transition Mod 4	Page 4 of 12
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<u>Funding Strip Code</u>	<u>Change in Funded Amount</u>
- A - 193100 - - 2570 - - C50105 - 193230 - - - - NONCOMP - - - -	\$47,870.00
Reference Requisition: 193P0330006	
2003 - - A - 193100 - - 2570 - - P50105 - 193230 - - - - NONCOMP - - - -	\$6,013.76
Reference Requisition: 193P0330006	
2003 - - A - 193100 - - 2570 - - M50018 - 193220 - - - - NONCOMP - - - -	\$1,044,325.77
Reference Requisition: 193P0330018	
003 - - A - 193100 - - 2570 - - P50020 - 193230 - - - - NONCOMP - - - -	\$5,100.00
Reference Requisition: 193P0330007	
103 - - A - 193100 - - 2570 - - P50023 - 193230 - - - - NONCOMP - - - -	\$159,920.00
Reference Requisition: 193P0330007	
103 - - A - 193100 - - 2570 - - P50023 - 193230 - - - - NONCOMP - - - -	\$22,680.00
Reference Requisition: 193P0330007	
103 - - A - 193100 - - 2570 - - P50023 - 193230 - - - - NONCOMP - - - -	\$17,730.00
Reference Requisition: 193P0330007	

Contract Level Funding Summary	Document Number 56PAPT205052/0004	Title FM/EUS2 Transition Mod 4	Page 5 of 12
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<u>Funding Strip Code</u>	<u>Change in Funded Amount</u>
- A - 193100 - - 2570 - - TZWHC1 - 193230 - - - - NONCOMP - - - -	\$16,380.00
Reference Requisition: 193P0330007	
2003 - - A - 193100 - - 2570 - - TZWHC1 - 193230 - - - - NONCOMP - - - -	\$22,280.00
Reference Requisition: 193P0330007	
2003 - - A - 193100 - - 2570 - - C50020 - 193230 - - - - NONCOMP - - - -	\$13,930.00
Reference Requisition: 193P0330007	
2003 - - A - 193100 - - 2570 - - M50020 - 193230 - - - - NONCOMP - - - -	\$18,950.00
Reference Requisition: 193P0330007	
2003 - - A - 193100 - - 2570 - - P50020 - 193230 - - - - NONCOMP - - - -	\$90,000.00
Reference Requisition: 193P0330007	
2003 - - A - 193100 - - 2570 - - L50020 - 193230 - - - - NONCOMP - - - -	\$4,740.00
Reference Requisition: 193P0330007	
2003 - - A - 193100 - - 2570 - - T50020 - 193230 - - - - NONCOMP - - - -	\$23,220.00
Reference Requisition: 193P0330007	

Contract Level Funding Summary	Document Number	Title	Page
	36PAPT205052/0004	FM/EUS2 Transition , Mod 4	6 of 12

<u>Funding Strip Code</u>	<u>Change in Funded Amount</u>
- A - 193100 - - 2570 - - C50021 - 193230 - - - - NONCOMP - - - -	\$4,710.00
Reference Requisition: 193P0330007	
2003 - - A - 193100 - - 2570 - - M50021 - 193230 - - - - NONCOMP - - - -	\$14,120.00
Reference Requisition: 193P0330007	
2003 - - A - 193100 - - 2570 - - P50021 - 193230 - - - - NONCOMP - - - -	\$161,470.00
Reference Requisition: 193P0330007	
2003 - - A - 193100 - - 2570 - - L50021 - 193230 - - - - NONCOMP - - - -	\$4,710.00
Reference Requisition: 193P0330007	
2003 - - A - 193100 - - 2570 - - T50021 - 193230 - - - - NONCOMP - - - -	\$13,840.00
Reference Requisition: 193P0330007	
2003 - - A - 193100 - - 2570 - - M50023 - 193230 - - - - NONCOMP - - - -	\$109,370.00
Reference Requisition: 193P0330007	
2003 - - A - 193100 - - 2570 - - M50023 - 193230 - - - - NONCOMP - - - -	\$456,757.78
Reference Requisition: 193P0330007	

Contract Level Funding Summary	Document Number 56PAPT205052/0004	Title FM/EUS2 Transition PU Mod 4	Page 7 of 12
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<u>Funding Strip Code</u>	<u>Change in Funded Amount</u>
- A - 193100 - - 2570 - - M50023 - 193230 - - - - NONCOMP - - - -	\$106,930.00

Reference Requisition: 193P0330007

2003 - - A - 193100 - - 2570 - - P50023 - 193230 - - - - NONCOMP - - - -	\$175,330.00
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Reference Requisition: 193P0330007

2003 - - A - 193100 - - 2570 - - M50018 - 193220 - - - - NONCOMP - - - -	\$121,445.84
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Reference Requisition: 193P0330019

2003 - - A - 193100 - - 2570 - - M50049 - 193441 - - - - NONCOMP - - - -	\$216,982.70
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Reference Requisition: 193P0330017

2003 - - A - 193100 - - 2570 - - M50049 - 193441 - - - - NONCOMP - - - -	\$115,691.50
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Reference Requisition: 193P0330017

2003 - - A - 193100 - - 2570 - - M50049 - 193441 - - - - NONCOMP - - - -	\$115,691.50
--------------------------------------------------------------------------	--------------

Reference Requisition: 193P0330017

2003 - - A - 193100 - - 2570 - - M50049 - 193441 - - - - NONCOMP - - - -	\$79,880.00
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Reference Requisition: 193P0330017

**Contract Level
Funding Summary**

Document Number
56PAPT205052/0004

Title
FM/EUS2 Transition IO Mod 4

Page
8 of 12

<u>Funding Strip Code</u>	<u>Change in Funded Amount</u>
- A - 193100 - - 2570 - - M50049 - 193441 - - - - NONCOMP - - - -	\$114,777.00
Reference Requisition: 193P0330017	
2003 - - A - 193100 - - 2570 - - M50049 - 193441 - - - - NONCOMP - - - -	\$222,682.10
Reference Requisition: 193P0330017	
2003 - - A - 193100 - - 2570 - - M50049 - 193441 - - - - NONCOMP - - - -	\$33,205.10
Reference Requisition: 193P0330017	
2003 - - A - 193100 - - 2570 - - M50049 - 193441 - - - - NONCOMP - - - -	\$585,759.26
Reference Requisition: 193P0330017	
2003 - - A - 192100 - - 2570 - - M50006 - 192221 - - - - NONCOMP - - - -	\$63,832.64
Reference Requisition: 192P0330022	
2003 - - A - 193100 - - 2571 - - PZLTC1 - 193431 - - - - NONCOMP - - - -	\$273,790.00
Reference Requisition: 193P0330023	
2003 - - A - 193100 - - 2571 - - M50004 - 193431 - - - - NONCOMP - - - -	\$198,690.00
Reference Requisition: 193P0330023	

<u>Funding Strip Code</u>	<u>Change in Funded Amount</u>
- A - 193100 - - 2571 - - TZNTC1 - 193431 - - - - NONCOMP - - - -	\$68,038.48

Reference Requisition: 193P0330023

2003 - - A - 193100 - - 2570 - - MZPKE1 - 193300 - - - - NONCOMP - - - -	\$301,022.40
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Reference Requisition: 193P0330021

2003 - - A - 193100 - - 2570 - - P50012 - 193431 - - - - NONCOMP - - - -	\$228,800.00
--------------------------------------------------------------------------	--------------

Reference Requisition: 193P0330028

Address Detail

FM/EUS2 Transition TO Mod 4

Document Number

56PAPT205052/0004

Page

10 of 12

Shipping Addresses

Code	Detail	Code	Detail
0001	Org: Addr: Attn: Phone: Fax:	0002	Org: Addr: Arlington VA 22202 Attn: No Contacts Identified Phone: Fax:

Invoice Addresses

Code	Detail
	Org: Addr: Washington DC 20231 Attn: (703) 305-8083 Phone: Fax:

The purpose of this task order modification to task order number 56-PAPT-2-05052/0004 is to incorporate the following work plans in the original Transition Period Task. Accordingly, said task order is hereby modified as follows:

1. Modify the original task order to incorporate Advanced Problem Resolution Support Task (TO-02), Computer Replacement Program (TO-04), Data Maintenance Support (TO-05), DBA Support (TO-06), Facilities Management Support (TO-07), Desktop Field Support (TO-08), Help Desk (TO-09), IEB and IEB T&E Hardware Support (TO-10), Network Operations (TO-12), NT Operating Systems Support (TO-13), User ID and Password Administration (TO-14), Technical Writing/Document Development (TO-15), UNIX Operating Systems Support, (TO-16), Hardware Maintenance Consolidation (TO-17) and Warehouse Operations (TO-18). The work plans for these tasks are provided as an attachment to this task order modification. The ceiling price of each of the task order is as follows:

Advanced Problem Resolution Support Task (TO-02)	\$ 360,107.64
Computer Replacement Program (TO-04)	\$ 405,264.80
Data Maintenance Support (TO-05)	\$ 134,356.32
DBA Support (TO-06)	\$ 151,657.92
Facilities Management Support (TO-07)	\$ 17,102.88
Desktop Field Support (TO-08)	\$1,051,720.92
Help Desk (TO-09)	\$ 686,148.84
IEB and IEB T&E Hardware Support (TO-10)	\$ 83,717.28
Network Operations (TO-12)	\$ 874,657.55
NT Operating Systems Support (TO-13)	\$ 138,919.86
User ID and Password Administration (TO-14)	\$ 159,364.80
Technical Writing/Document Development (TO-15)	\$ 68,827.04
UNIX Operating Systems Support, (TO-16)	\$ 86,890.32
Hardware Maintenance Consolidation (TO-17)	\$1,205,283.03
Warehouse Operations (TO-18)	<u>\$ 118,748.70</u>
	\$5,542,767.90

2. The funding provided on the original Transition Task is hereby increased from \$5,254,251.10 by \$ 5,566,946.17 a new total of \$ 10,821,197.27.

3. The period of performance of each of the task orders listed above is estimated to end on January 31, 2003, with the exception of TO-04, which is issued through December 20, 2002. However, if the ceiling price of the task order will be exceeded prior to January 31, 2003, the Contractor is only authorized to work up to the ceiling price of the task order.

Except as provided herein, all other terms and conditions of the contract remain unchanged and in full force and effect.

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

1. CONTRACT ID CODE _____ Page 1 of 2

2. AMENDMENT/MODIFICATION NO. 0005 3. EFFECTIVE DATE 01/31/2003 4. REQUISITION/PURCHASE REQ. NO. See Lines 5. PROJECT NO. (If applicable) _____

6. ISSUED BY CODE 17 Office of Procurement U.S. Patent and Trademark Office, 2011 Crystal Drive, Suite 810 Arlington, VA 22202 7. ADMINISTERED BY (If other than Item 6) CODE _____

3. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and Zip Code) Carol Trawick Trawick and Associates 6900 Wisconsin Avenue, Suite 400 Bethesda, MD 20815 9A. AMENDMENT OF SOLICITATION NO. _____ 9B. DATED (SEE ITEM 11) _____ 10A. MODIFICATION OF CONTRACT/ORDER NO. 50PAPT201025 / 56PAPT205052 (X) 10B. DATED (SEE ITEM 13) 08/23/2002 (X)

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers is extended, is not extended. Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods: (a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

2. ACCOUNTING AND APPROPRIATION DATA (If required) See Funding Detail

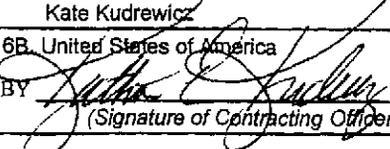
13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A. B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b). C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF: _____ D. OTHER (Specify type of modification and authority) Changes Clause of the contract.

IMPORTANT: Contractor is not, is required to sign this document and return _____ copies to the issuing office.

DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.) This modification extends the period of performance to this task order at no additional cost to the Government. See the attached for details.

As provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

NAME AND TITLE OF SIGNER (Type or print)		16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) Kate Kudrewicz	
CONTRACTOR/OFFEROR	15C. DATE SIGNED	16B. United States of America BY  (Signature of Contracting Officer)	16C. DATE SIGNED 01/31/2003
(Signature of person authorized to sign)			

Line Item Summary	Requirement Number 56PAPT205052/0005	Title FM/EUS2 Transition. Mod 5	Page 2 of 2
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Line Item Number	Description	Delivery Date (Start date to End date)	Quantity	Unit of Issue	Unit Price	Total Cost
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This is task order 56-PAPT-2-05052/0005 to the Transition Task.

No Changed Line Item Fields

Previous Total: \$10,821,197.27
Modification Total: \$0.00
Grand Total: \$10,821,197.27

Requirement P.O.C. Kate Kudrewicz (703) 305-8324. COTR, Tom King (703) 305-8999. Contractor P.O.C. Carol Trawick, (301) 654-6088. Fax (301) 56-2251.

Task Order 56-PAPT-2-05052
Contract 50-PAPT-2-01025

Modification MO05

The purpose of this task order modification to task order number 56-PAPT-2-05052/0005 is to incorporate extend the period of performance of the following work plans in the original Transition Period Task. Accordingly, said task order is hereby modified as follows:

1. Modify the original task order and any of its modifications to extend the period of performance of the task orders entitled, Data Maintenance Support (TO-05), DBA Support (TO-06), Help Desk (TO-09), Network Operations (TO-12), User ID and Password Administration (TO-14), Hardware Maintenance Consolidation (TO-17) and Warehouse Operations (TO-18), through February 17, 2003. The ceiling price of each of the task orders listed above remains unchanged.

Except as provided herein, all other terms and conditions of the contract remain unchanged and in full force and effect.

OF R FOR S PLIES OR SERVICES

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER 09/23/2002	2. CONTRACT NO. (If any) 50PAPT201025	6. SHIP TO: No Contacts Identified	
ORDER NO. 56PAPT205060	4. REQUISITION/REFERENCE NO. 150P0230199	a. NAME OF CONSIGNEE	
ISSUING OFFICE (Address correspondence to) Office of Procurement U.S. Patent and Trademark Office 2011 Crystal Drive, Suite 810 Arlington VA 22202		b. STREET ADDRESS	
7. TO:		c. CITY	d. STATE e. ZIP CODE
NAME OF CONTRACTOR Carol Trawick		f. SHIP VIA	
COMPANY NAME Trawick and Associates		8. TYPE OF ORDER	
STREET ADDRESS 6900 Wisconsin Avenue, Suite 400		<input type="checkbox"/> a. PURCHASE	<input type="checkbox"/> b. DELIVERY - Except for billing instructions on the reverse, this delivery order is subject to instructions contained on this side only of this form and is issued subject to the terms and conditions of the above-numbered contract.
CITY Bethesda	e. STATE MD	f. ZIP CODE 20815	REFERENCE YOUR: Please furnish the following on the terms and conditions specified on both sides of this order and on the attached sheet, if any, including delivery as indicated.
ACCOUNTING AND APPROPRIATION DATA 2 - - A - 150997 - - 2528 - - C25270 - 150210 - - - - -		10. REQUISITIONING OFFICE Patent Academy	

BUSINESS CLASSIFICATION (Check appropriate box(es))

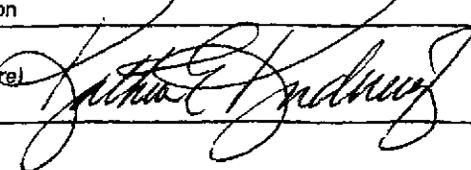
a. SMALL b. OTHER THAN SMALL c. DISADVANTAGED d. WOMEN-OWNED

F.O.B. POINT Destination	14. GOVERNMENT B/L NO.	15. DELIVER TO F.O.B. POINT ON OR BEFORE (Date)	16. DISCOUNT TERMS
13. PLACE OF INSPECTION	b. ACCEPTANCE		10 days % 20 days % 30 days % days %

17. SCHEDULE (See reverse for Rejections)

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
	SEE LINE ITEM DETAIL					

18. SHIPPING POINT	19. GROSS SHIPPING WEIGHT	20. INVOICE NO.	
21. MAIL INVOICE TO: (703) 305-8083			17(h) TOT. (Cont. pages)
a. NAME U.S. Patent and Trademark Office			
b. STREET ADDRESS (or P.O. Box) Office of Finance, Box 17			
c. CITY Washington	d. STATE DC	e. ZIP CODE 20231	\$30,738.72

UNITED STATES OF AMERICA BY (Signature)  9/23/02

23. NAME (Typed)
Kate Kudrewicz
TITLE: CONTRACTING/ORDERING OFFICER

**ORDER FOR SUPPLIES OR SERVICE
SCHEDULE - CONTINUATION**

PAGE NO.
3 of 4

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER 09/23/2002	CONTRACT NO. 50PAPT201025	ORDER NO. 56PAPT205060
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ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
01	<p><i>This is Task Order 56-PAPT-2-05060 to Contract No. 50-PAPT-2-01025. This task order supports AV Tech Support for the Patent Academy. The period of performance is through January 31, 2003.</i></p> <p>Reference Requisition: 150P0230199</p> <p><i>Procurement P.O.C. Kate Kudrewicz, (703) 305-8324. COTR, Tom King, (703) 305-8999. Contractor P.O.C. Elaine Watson (703) 416-4105.</i></p>					

TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 17i) ➡ \$0.00

Contract Level Funding Summary	Document Nur PAPT205060	Title AV Tech Support TO-00	Page 4 of 4
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2002 - - A - 150997 - - 2528 - - C25270 - 150210 - - - - -

\$30,738.72

Reference Requisition: 150P0230199

Total Funding: \$30,738.72

PATENT ACADEMY AV TECHNICAL SUPPORT
TASK ORDER TO-03

CONTRACT NO.: 50-PAPT-2-01025 ORDER NO.: 56-PAPT-2-05060
EFFECTIVE DATE: September 2, 2002
REQUISITION NO.: 150P0230199

ISSUED BY: U.S. PATENT AND TRADEMARK OFFICE
 OFFICE OF PROCUREMENT
 BOX 6
 WASHINGTON, DC 20231

ISSUED TO: TRAWICK AND ASSOCIATES
 6900 WISCONSIN AVENUE
 SUITE 400
 BETHESDA, MD 20815

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

ACCOUNTING AND APPROPRIATION DATA:

2002 A 150997 2528 C25270 150210 - OBLIGATE \$30,738.72

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL NOT-TO-EXCEED AMOUNT FOR TO-03	[REDACTED]	[REDACTED]	[REDACTED]	30,738.72

This task order is issued pursuant to the authority of the Contracting Officer and Special Contract Requirements, Clause H.17. TASK ORDERS PROCEDURES of the contract.

The contractor shall provide the necessary personnel and materials to accomplish this task in accordance with the statement of work, task list, and contractor work plan as approved and attached. The Contractor or any of its subcontractors shall not exceed the ceiling amount provided above in performance of this task order, without prior written approval and an executed modification to this task order.

The effective period of performance of this delivery/task order shall be from the effective date of this order through January 31, 2003, unless otherwise mutually agreed upon and properly modified by the Contracting Officer and Trawick and Associates.

Office of the Chief Information Officer FMEUS2 Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999 Jack Bowles 305-8823	Patent Academy AV Technician support (TO-03)	Long Kim Ung 305-9005

1. BACKGROUND

The services covered under this task order provide comprehensive support of all hardware and software used for training purposes by the Patent Academy, including any new technology that may be deployed.

2. STATEMENT OF WORK REQUIREMENTS

2.1. OPERATION AND MAINTENANCE OF VIDEO-TELECONFERENCING SYSTEM:

- 2.1.1. The contractor shall ensure that all equipment related to the operation is working properly. This equipment is comprised of all devices that are utilized as part of any video teleconferencing sessions including both interviews and training sessions. The contractor shall log onto the system(s) daily to ensure that connections are working properly to all PTDL sites.
- 2.1.2. The contractor shall perform necessary steps to prepare for all video teleconferencing sessions including the move of equipment to different rooms within the Academy or the PTO campus.
- 2.1.3. The contractor shall advise PTO staff or others as appropriate, of any technical problems with the video teleconferencing system. The contractor shall be present during any maintenance or repairs on the system.
- 2.1.4. The contractor shall assist presenters in learning the basic operation of the video teleconferencing system. Nearby during session/presentation for system problems/troubleshooting.

2.2. OPERATION AND MAINTENANCE OF PATENT ACADEMY AUDIO/VISUAL AND AUTOMATED INFRASTRUCTURE

- 2.2.1. The technician must become familiar with the operation and function of all equipment, devices and software currently used in the Patent Academy for training and presentations.

- 2.2.2. The contractor shall ensure all equipment is in working condition and when necessary will perform routine operational maintenance, e.g. replace lamps and bulbs. The contractor shall be able to determine whether any malfunctioning equipment should be submitted to the appropriate service provider for maintenance. This is done through the initial troubleshooting process, which the Patent Academy will train the technician to perform.
- 2.2.3. The contractor shall work with other technical or support personnel on an as needed basis to assist other organizations in utilizing the Patent Academy training rooms (e.g., CIO technical personnel who is currently using training room for Y2K Compliance).
- 2.2.4. The contractor shall ensure that all connections to video equipment are properly connected in the computer training rooms (e.g., TECH Commander -- which allows the instructor's system to take control of one or all of the student screens).
- 2.2.5. The contractor shall ensure that Training Rooms with built-in projection devices such as Rooms 1 and 6 (which house **Sanyo** video projectors **Starsound** portable microphones, computers and television monitors) are working properly before training sessions begin.
- 2.2.6. The contractor shall maintain the Academy security cameras and VCR including replacing and storing surveillance camera videotapes for 30 days. In the event any of the surveillance cameras are not functioning properly, The contractor shall perform basic troubleshooting and if necessary report the malfunction to the appropriate Academy staff.
- 2.2.7. The contractor shall be responsible for determining whether additional computer or audio-visual supplies need to be procured. Provide list of vendors for procuring compatible supplies, parts, upgrades and equipment. This information will be reported to appropriate Academy personnel for processing.
- 2.2.8. The contractor shall be knowledgeable in the use of audio-visual equipment for recording both sound and video. The contractor shall become familiar with devices for mixing and altering video presentations.
- 2.2.9. The contractor shall ensure that any A/V or computer equipment needed for use in any room is set up and functioning properly no later than 30 minutes prior to the start of the session.
- 2.2.10. The contractor shall be knowledgeable in installing and troubleshooting Microsoft PowerPoint and Astound presentations.

2.3. MAINTAIN COMPUTER TRAINING ROOMS INCLUDING HARDWARE, SOFTWARE, AND NETWORK FUNCTIONALITY

- 2.3.1. The contractor shall ensure that the computers in the computer training rooms are working properly before training sessions begin. Any problems with systems that need attention will be promptly called into the PTO Help Desk and reported to the appropriate Academy staff.
- 2.3.2. The contractor shall maintain the Academy online database where all computer problems will be logged in. Quarterly reports may be required summarizing all system discrepancies.
- 2.3.3. The contractor shall serve as the primary point-of-contact with the Help Desk for all computer hardware, software and network problems.
- 2.3.4. The contractor shall ensure that all necessary PTOnet network drops are activated and connecting to PTOnet before training sessions begin. The technician should have basic knowledge of network topology.
- 2.3.5. The contractor shall make all requests for additional PTOnet drops or network activations on an as needed basis.
- 2.3.6. The technician must be familiar with Office 97 software and the Windows NT operating system. The technician must become knowledgeable about the basic operation of the Patent Examination Toolkit software taught at the Academy and become familiar with any new software or systems deployed to the Academy.
- 2.3.7. The contractor shall maintain the Patent Academy training ID and passwords including Internet, NT and PTOnet.

2.4. ASSIST PTO PROPERTY CUSTODIAN IN PERFORMING DUTIES:

- 2.4.1. The contractor shall assist the Academy Property Custodian (PC) in the performance of all PC duties

2.5. ORDER COMPUTER TRAINING-RELATED SUPPLIES:

- 2.5.1. The contractor shall be responsible for assessing the supply situation for all computer-training supplies to ensure that all equipment has what's needed to function properly. The contractor shall not order supplies but will forward the request to appropriate Academy staff.

3. GOVERNMENT FURNISHED MATERIAL

The Government shall furnish space for the technician.

4. LEVEL OF EFFORT

No work outside the scope of this task order will be performed under this Task Order without the written direction of the COTR.

This option covers the period through January 31, 2003, however the Government, reserves the right to de-scope this task order at any time. The Government will notify Contractor ten (10) working days prior to termination of the task order.

5. PLACE OF PERFORMANCE

The majority of the Work shall be performed throughout the Patent Academy, Crystal Square 4, Suite 700 occupied by the PTO in Arlington , VA.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the COTR (electronic form preferred).

Deliverable		Due
Activity Report	Contractor shall provide brief descriptions of all support activities performed previous week and planned activities for upcoming periods.	By COB each Monday

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS/LCM is required under this task order.

8. TRAWICK RESPONSE

TO-03, September 2, 2002 – January 31, 2003 – Initial Statement of Work for the Patent Academy AV Technician Support Task – FMEUS2 contract

TRAWICK proposes to perform the work specified in the Statement of Work for the period September 2, 2002 – January 31, 2003 with the following staffing level:

<u>Labor Category</u>	<u>Quantity</u>
[REDACTED]	[REDACTED]

The following table represents the functional responsibilities, staffing levels, and labor categories selected to perform the work specified in the Statement of Work.

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

Responsibilities Matrix			
Function	Labor Category	Qty	Duties and Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

A. **Resource Summary.** The following table provides a high level summary for all labor hours, labor costs, and ODC costs for the period of September 2, 2002 – January 31, 2003:

	Hours	Cost
[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]
		30,738.72

B. **Resources by labor category.** The following table provides a detailed breakdown of labor hours and costs per labor category for the period of September 2, 2002 – January 31, 2003

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	[REDACTED]	[REDACTED]	30,738.72

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

CONTRACT ID CODE

Page
1 of 3

1. AMENDMENT/MODIFICATION NO. 0001	3. EFFECTIVE DATE 01/28/2003	4. REQUISITION/PURCHASE REQ. NO. See Funding Detail	5. PROJECT NO. (If applicable)
---------------------------------------	---------------------------------	--------------------------------------------------------	--------------------------------

6. ISSUED BY Office of Procurement U.S. Patent and Trademark Office, 2011 Crystal Drive, Suite 810 Arlington, VA 22202	CODE 17	7. ADMINISTERED BY (If other than Item 6)	CODE
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8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and Zip Code) Carol Trawick Trawick and Associates 6900 Wisconsin Avenue, Suite 400 Bethesda, MD 20815	9A. AMENDMENT OF SOLICITATION NO.
	9B. DATED (SEE ITEM 11)
	(X) 10A. MODIFICATION OF CONTRACT/ORDER NO. 50PAPT201025 / 56PAPT205060
	(X) 10B. DATED (SEE ITEM 13) 09/23/2002

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers is extended, is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:

(a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (If required)

2003 - - A - 113100 - - 2570 - - B25270 - 113100 - - - - NONCOMP - - - - \$31,341.44

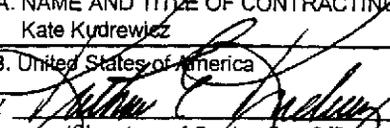
13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

<input type="checkbox"/>	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
<input type="checkbox"/>	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
<input type="checkbox"/>	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
<input checked="" type="checkbox"/>	D. OTHER (Specify type of modification and authority) Task Order Clause of the Contract.

IMPORTANT: Contractor is not, is required to sign this document and return _____ copies to the issuing office.

DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

This is modification MO01 to Task Order 56-PAPT-2-05060 to Contract No. 50-PAPT-2-01025. This modified task order adds additional funding. The period of performance of this task order is February 1, 2003 through June 30, 2003.

NAME AND TITLE OF SIGNER (Type or print)		16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) Kate Kudrewicz	
CONTRACTOR/OFFEROR	15C. DATE SIGNED	16B. United States of America BY  (Signature of Contracting Officer)	16C. DATE SIGNED 01/28/2003
(Signature of person authorized to sign)			

Line Item Summary	Document Number 56PAPT205060/0001	Title AV Tech Support TO-03	Page 2 of 3
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FYs Fund Budget Org Sub Object Class Sub Program Cost Org Sub Proj/Job No. Sub Reporting Category

Division Closed FYs Cancelled Fund

Line Item Number	Description	Delivery Date (Start date to End date)	Quantity	Unit of Issue	Unit Price	Total Cost
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This is Task Order 56-PAPT-2-05060/MO01 to Contract No. 50-PAPT-2-01025. This task order supports AV Tech Support for the Patent Academy. The period of performance is through June 30, 2003.

No Changed Line Item Fields

Previous Total: \$30,738.72
Modification Total: \$31,341.44
Grand Total: \$62,080.16

urement P.O.C. Kate Kudrewicz, (703) 305-8324. COTR, Tom King, (703) 305-8999. Contractor P.O.C. Elaine Watson (703) 416-4105.

Contract Level Funding Summary	Document Number 56PAPT205000001	Title AV Tech Support TO-03	Page 3 of 3
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Funding Strip Code
2003 - - A - 113100 - - 2570 - - B25270 - 113100 - - - - NONCOMP - - - -

Change in Funded Amount
\$31,341.44

Reference Requisition: QMTP0330049

PATENT ACADEMY AV TECHNICAL SUPPORT
TASK ORDER TO-03

CONTRACT NO.: 50-PAPT-2-01025 ORDER NO.: 56-PAPT-2-05060/ MOD MO01
EFFECTIVE DATE: February 1, 2003
REQUISITION NO.: QMTP0330049

ISSUED BY: U.S. PATENT AND TRADEMARK OFFICE
 OFFICE OF PROCUREMENT
 BOX 6
 WASHINGTON, DC 20231

ISSUED TO: TRAWICK AND ASSOCIATES
 6900 WISCONSON AVENUE
 SUITE 400
 BETHESDA, MD 20815

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

ACCOUNTING AND APPROPRIATION DATA:

2003 A 113100 2570 B25270 113100 - OBLIGATE \$31,341.44

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	31,341.44

This task order is issued pursuant to the authority of the Contracting Officer and Special Contract Requirements, Clause H.17. TASK ORDERS PROCEDURES of the contract.

The contractor shall provide the necessary personnel and materials to accomplish this task in accordance with the statement of work, task list, and contractor work plan as approved and attached. The Contractor or any of its subcontractors shall not exceed the ceiling amount provided above in performance of this task order, without prior written approval and an executed modification to this task order.

The effective period of performance of this delivery/task order shall be from the effective date of this order through June 30, 2003, unless otherwise mutually agreed upon and properly modified by the Contracting Officer and Trawick and Associates.

Office of the Chief Information Officer FMEUS2 Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999 Jack Bowles 305-8823	Patent Academy AV Technician support (TO-03)	Long Kim Ung 305-9005

1. BACKGROUND

The services covered under this task order provide comprehensive support of all hardware and software used for training purposes by the Patent Academy, including any new technology that may be deployed.

2. STATEMENT OF WORK REQUIREMENTS

2.1. OPERATION AND MAINTENANCE OF VIDEO-TELECONFERENCING SYSTEM:

- 2.1.1. The contractor shall ensure that all equipment related to the operation is working properly. This equipment is comprised of all devices that are utilized as part of any video teleconferencing sessions including both interviews and training sessions. The contractor shall log onto the system(s) daily to ensure that connections are working properly to all PTDL sites.
- 2.1.2. The contractor shall perform necessary steps to prepare for all video teleconferencing sessions including the move of equipment to different rooms within the Academy or the PTO campus.
- 2.1.3. The contractor shall advise PTO staff or others as appropriate, of any technical problems with the video teleconferencing system. The contractor shall be present during any maintenance or repairs on the system.
- 2.1.4. The contractor shall assist presenters in learning the basic operation of the video teleconferencing system. Nearby during session/presentation for system problems/troubleshooting.

2.2. OPERATION AND MAINTENANCE OF PATENT ACADEMY AUDIO/VISUAL AND AUTOMATED INFRASTRUCTURE

- 2.2.1. The technician must become familiar with the operation and function of all equipment, devices and software currently used in the Patent Academy for training and presentations.

- 2.2.2. The contractor shall ensure all equipment is in working condition and when necessary will perform routine operational maintenance, e.g. replace lamps and bulbs. The contractor shall be able to determine whether any malfunctioning equipment should be submitted to the appropriate service provider for maintenance. This is done through the initial troubleshooting process, which the Patent Academy will train the technician to perform.
- 2.2.3. The contractor shall work with other technical or support personnel on an as needed basis to assist other organizations in utilizing the Patent Academy training rooms (e.g., CIO technical personnel who is currently using training room for Y2K Compliance).
- 2.2.4. The contractor shall ensure that all connections to video equipment are properly connected in the computer training rooms (e.g., TECH Commander -- which allows the instructor's system to take control of one or all of the student screens).
- 2.2.5. The contractor shall ensure that Training Rooms with built-in projection devices such as Rooms 1 and 6 (which house **Sanyo** video projectors **Starsound** portable microphones, computers and television monitors) are working properly before training sessions begin.
- 2.2.6. The contractor shall maintain the Academy security cameras and VCR including replacing and storing surveillance camera videotapes for 30 days. In the event any of the surveillance cameras are not functioning properly, the contractor shall perform basic troubleshooting and if necessary report the malfunction to the appropriate Academy staff.
- 2.2.7. The contractor shall be responsible for determining whether additional computer or audio-visual supplies need to be procured. Provide list of vendors for procuring compatible supplies, parts, upgrades and equipment. This information will be reported to appropriate Academy personnel for processing.
- 2.2.8. The contractor shall be knowledgeable in the use of audio-visual equipment for recording both sound and video. The contractor shall become familiar with devices for mixing and altering video presentations.
- 2.2.9. The contractor shall ensure that any A/V or computer equipment needed for use in any room is set up and functioning properly no later than 30 minutes prior to the start of the session.
- 2.2.10. The contractor shall be knowledgeable in installing and troubleshooting Microsoft PowerPoint and Astound presentations.

2.3. MAINTAIN COMPUTER TRAINING ROOMS INCLUDING HARDWARE, SOFTWARE, AND NETWORK FUNCTIONALITY

- 2.3.1. The contractor shall ensure that the computers in the computer training rooms are working properly before training sessions begin. Any problems with systems that need attention will be promptly called into the PTO Help Desk and reported to the appropriate Academy staff.
- 2.3.2. The contractor shall maintain the Academy online database where all computer problems will be logged in. Quarterly reports may be required summarizing all system discrepancies.
- 2.3.3. The contractor shall serve as the primary point-of-contact with the Help Desk for all computer hardware, software and network problems.
- 2.3.4. The contractor shall ensure that all necessary PTONet network drops are activated and connecting to PTONet before training sessions begin. The technician should have basic knowledge of network topology.
- 2.3.5. The contractor shall make all requests for additional PTONet drops or network activations on an as needed basis.
- 2.3.6. The technician must be familiar with Office 97 software and the Windows NT operating system. The technician must become knowledgeable about the basic operation of the Patent Examination Toolkit software taught at the Academy and become familiar with any new software or systems deployed to the Academy.
- 2.3.7. The contractor shall maintain the Patent Academy training ID and passwords including Internet, NT and PTONet.

2.4. ASSIST PTO PROPERTY CUSTODIAN IN PERFORMING DUTIES:

- 2.4.1. The contractor shall assist the Academy Property Custodian (PC) in the performance of all PC duties

2.5. ORDER COMPUTER TRAINING-RELATED SUPPLIES:

- 2.5.1. The contractor shall be responsible for assessing the supply situation for all computer-training supplies to ensure that all equipment has what's needed to function properly. The contractor shall not order supplies but will forward the request to appropriate Academy staff.

3. GOVERNMENT FURNISHED MATERIAL

The Government shall furnish space for the technician.

4. LEVEL OF EFFORT

No work outside the scope of this task order will be performed under this Task Order without the written direction of the COTR.

This option covers the period through June 30, 2003, however the Government, reserves the right to de-scope this task order at any time. The Government will notify Contractor ten (10) working days prior to termination of the task order.

5. PLACE OF PERFORMANCE

The majority of the Work shall be performed throughout the Patent Academy, Crystal Square 4, Suite 700 occupied by the PTO in Arlington, VA.

6. SCHEDULE OF DELIVERABLES

All deliverables shall be delivered to the COTR (electronic form preferred).

	<u>Deliverable</u>	<u>Due</u>
Activity Report	Contractor shall provide brief descriptions of all support activities performed previous week and planned activities for upcoming periods.	By COB each Monday

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS/LCM is required under this task order.

8. TRAWICK RESPONSE

TO-03, February 1, 2003 – June 30, 2003 – Statement of Work for the Patent Academy AV Technician Support Task – FMEUS2 contract

TRAWICK proposes to perform the work specified in the above Statement of Work for the period February 1, 2003 – June 30, 2003 with the following staffing level:

Labor Category

Quantity

[REDACTED]

[REDACTED]

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

The following table represents the functional responsibilities, staffing levels, and labor categories selected to perform the work specified in the Statement of Work.

Responsibilities Matrix			
Function	Labor Category	Qty	Duties and Responsibilities
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

A. **Resource Summary.** The following table provides a high level summary for all labor hours, labor costs, and ODC costs for the period of February 1, 2003 – June 30, 2003:

	Hours	Cost
[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	\$31,341.44

B. **Resources by labor category.** The following table provides a detailed breakdown of labor hours and costs per labor category for the period of February 1, 2003 – June 30, 2003:

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	[REDACTED]	[REDACTED]	\$31,341.44

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

OFFER FOR SUPPLIES OR SERVICES

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

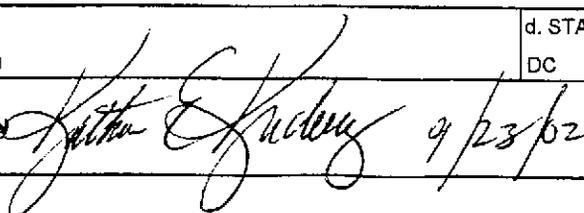
DATE OF ORDER 09/23/2002	2. CONTRACT NO. (If any) 50PAPT201025	6. SHIP TO: No Contacts Identified		
ORDER NO. 56PAPT205061	4. REQUISITION/REFERENCE NO. 188P0230196	a. NAME OF CONSIGNEE		
ISSUING OFFICE (Address correspondence to) Office of Procurement J.S. Patent and Trademark Office 2011 Crystal Drive, Suite 810 Arlington VA 22202		b. STREET ADDRESS		
		c. CITY	d. STATE	e. ZIP CODE
7. TO:		f. SHIP VIA		
NAME OF CONTRACTOR Carol Trawick		8. TYPE OF ORDER		
COMPANY NAME Trawick and Associates		<input type="checkbox"/> a. PURCHASE		b. DELIVERY - Except for billing instructions on the reverse, this delivery order is subject to instructions contained on this side only of this form and is issued subject to the terms and conditions of the above-numbered contract.
STREET ADDRESS 6900 Wisconsin Avenue, Suite 400		REFERENCE YOUR:		
CITY Bethesda		Please furnish the following on the terms and conditions specified on both sides of this order and on the attached sheet, if any, including delivery as indicated.		
ACCOUNTING AND APPROPRIATION DATA 2 - A - 188270 - - 2570 - - 010304 - 188270 - - - - -		e. STATE MD	f. ZIP CODE 20815	10. REQUISITIONING OFFICE OFFICE OF ADMIN SERVICES

BUSINESS CLASSIFICATION (Check appropriate box(es))			
<input checked="" type="checkbox"/> a. SMALL	<input type="checkbox"/> b. OTHER THAN SMALL	<input type="checkbox"/> c. DISADVANTAGED	<input checked="" type="checkbox"/> d. WOMEN-OWNED
F.O.B. POINT Destination	13. PLACE OF INSPECTION	14. GOVERNMENT B/L NO.	15. DELIVER TO F.O.B. POINT ON OR BEFORE (Date)
	b. ACCEPTANCE		16. DISCOUNT TERMS
			10 days % 20 days % 30 days % days %

17. SCHEDULE (See reverse for Rejections)

ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
	SEE LINE ITEM DETAIL					

18. SHIPPING POINT	19. GROSS SHIPPING WEIGHT	20. INVOICE NO.	
21. MAIL INVOICE TO: (703) 305-8083			17(h) TOT. (Cont. pages)
a. NAME U.S. Patent and Trademark Office			
b. STREET ADDRESS (or P.O. Box) Office of Finance, Box 17			17(i) GRAND TOTAL \$594,268.80
c. CITY Washington	d. STATE DC	e. ZIP CODE 20231	

UNITED STATES OF AMERICA BY (Signature) 	23. NAME (Typed) Kate Kudrewicz TITLE: CONTRACTING/ORDERING OFFICER
-----------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------

**ORDER FOR SUPPLIES OR SERVICE
SCHEDULE - CONTINUATION**

PAGE NO.
3 of 4

IMPORTANT: Mark all packages and papers with contract and/or order numbers.

DATE OF ORDER 09/23/2002	CONTRACT NO. 50PAPT201025	ORDER NO. 56PAPT205061
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ITEM NO. (a)	SUPPLIES OR SERVICES (b)	QUANTITY ORDERED (c)	UNIT (d)	UNIT PRICE (e)	AMOUNT (f)	QUANTITY ACCEPTED (g)
01	<p><i>This is Task Order 56-PAPT-2-05061 to Contract No. 50-PAPT-2-01025 for the Inventory Support Task Order TO-11. The period of performance is through June 30, 2003.</i></p> <p>Reference Requisition: 188P0230196</p> <p><i>Procurement P.O.C. Kate Kudrewicz, (703) 305-8324. COTR, Tom King, (703) 305-8999. Contractor P.O.C. Elaine Watson, (703) 416-4105.</i></p>					

TOTAL CARRIED FORWARD TO 1ST PAGE (ITEM 17) ⇒ \$0.00

Contract Level Funding Summary	Document Number 06PAPT205061	Title Inventory Support TC-r1	Page 4 of 4
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002 - - A - 188270 - - 2570 - - 010304 - 188270 - - - - -

594,268.80

Reference Requisition: 188P0230196

Total Funding: \$594,268.80

Office of the Chief Information Officer FMEUS2 Statement of Work		
COTR	Task Title	Task Manager
Tom King 305-8999 Jack Bowles 305-8823	Inventory Support Team (TO-11)	Tom King 305-8999 Historical POC: Dawn Cassidy 305-4312

1. BACKGROUND

The U.S. Patent and Trademark Office (USPTO) have the responsibility to implement and maintain an accountable asset management system. Accountability includes the safeguarding, financial reporting, and accurate physical location of an asset throughout its life span in the USPTO (i.e., from receipt through disposal).

On an annual basis, the Department of Commerce's Office of the Inspector General (OIG) performs a testing of the USPTO's accountable asset management system. Over the past several fiscal years, the USPTO has made considerable improvements to the system in an effort to ensure a favorable finding from the OIG.

The support required under this task order, in conjunction with the scanning performed under other task orders, is an integral part of the USPTO's accountable asset management system.

2. STATEMENT OF WORK

2.1. **Inventory Support:** The contractor shall be responsible for the project management, oversight coordination, process and inventory support for the following activities:

2.1.1. Contractor shall be responsible for the execution of the Fiscal Year Asset Management guidelines and schedules of activities for all the organizations within the USPTO. The guidelines and schedules of activities will be determined by the USPTO's Asset Management Team and will be provided to the contractor – please refer to Appendix A for this fiscal year's documents. As changes are warranted, updates to these documents will be made by the Asset Management Team and will be subsequently provided to the contractor.

2.1.2. Contractor shall be responsible for the preparation and distribution of monthly Property Custodian report packages to all Property Custodians and/or Property Accountability Officers in accordance with the monthly report schedule. Report packages will include a monthly report cover sheet, monthly Property Custodian Report, and Transaction Report(s).

2.1.3. Contractor shall be responsible for the preparation and distribution of the quarterly Property Custodian report packages to all Property Custodians and/or Property Accountability Officers in accordance with the quarterly

- report schedule. Report package will include a quarterly report cover sheet, Property Custodian Certification Report, and Transaction Report(s).
- 2.1.4. Contractor will be responsible for the development, maintenance and issuance of tracking documents to reflect statistics to support the Fiscal Year Asset Management guidelines and schedules of activities. Please refer to Appendix B for current tracking reports.
 - 2.1.5. Contractor shall be responsible for coordination and inventory support with asset movement and changes in Property Custodian assignment of responsibilities.
 - 2.1.6. Contractor shall be responsible for interacting with the designated Property Accountability Officers, Property Custodians, and designated point of contacts to answer their questions, and resolve inventory questions and discrepancies.
 - 2.1.7. Contractor shall be responsible for reviewing and coding of Property Custodian reports to ensure all updates are made correctly and within the required timeframes. Processing of these reports should be made with 95% accuracy and within 48 hours of receipt.
 - 2.1.8. Contractor will be responsible for managing and accounting for all Department of Commerce provided bar code labels (i.e., CD bar code labels).
 - 2.1.9. Contractor will be responsible for the creation and issuance of all non-Department of Commerce provided bar code labels (e.g., CFG, CFGH, CFGT, etc.)
 - 2.1.10. Contractor will be responsible for daily reconciliation of the "To Be Assigned" Property Custodian listing. Reconciliation should ensure that all assets are properly assigned to the designated Property Custodian, User, CFG, and location with 95% accuracy and within 48 hours.
 - 2.1.11. Contractor shall be responsible for updates to the official Asset Management system based on submitted asset management related forms to include the "Agreement/Authorization for Home Use of Assets" and "Transfer of Assets".
 - 2.1.12. Contractor shall be responsible for establishing a process to ensure that all equipment certified for Home Use is re-verified 30 days prior to the 'estimated return date.'

2.2. **Category, Type, Item (CTI) Maintenance:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

- 2.2.1. Contractor shall be responsible for maintaining the current Category, Type, Item listing to include:
 - 2.2.1.1. Adding new asset descriptions as they are received for the 1st time at the USPTO (e.g., at the central warehouse, on-site of USPTO Campus, etc.).
 - 2.2.1.2. Consolidation of existing CTI as determined/approved by the USPTO

- 2.2.1.3. Inactivating/Archiving existing CTI as determined/approved by the USPTO
- 2.2.1.4. Standardization of asset descriptions for existing and newly acquired assets.
- 2.2.1.5. As an initial effort, the contractor shall be responsible for performing a complete and thorough analysis of the existing CTI and identifying areas of improvement to the USPTO. All changes approved by the USPTO will be the contractor's responsibility to effect changes in the official Asset Management system. In addition, it's the USPTO's belief that this effort can be separated into two distinct efforts: (1) Consolidation of existing Item descriptions for like items and to correct known typographical errors; and (2) Thorough analysis of remaining CTI to include physical observation of assets to determine 'true' CTI of selected asset(s) before implementing changes. Of the USPTO's top priorities are the Item descriptions for the Types of Servers, CPUs, Monitors and Printers.

2.3. ***Property Custodian Administration:*** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

- 2.3.1. Contractor shall be responsible for maintaining the current Official Property Custodian Listing to include:
 - 2.3.1.1. Adding all newly designated Property Custodians.
 - 2.3.1.2. Updating existing Property Custodians to reflect any change of information (e.g., their phone number, location, Property Accountability Officer, etc.)
 - 2.3.1.3. Realigning Property Custodians and their associated assets as requested.
 - 2.3.1.4. On a monthly basis, the contractor shall issue the Official Property Custodian Listing to all Organization Representatives on the Asset Management Team. This listing should be issued at the commencement of each month and coincide with the distribution of the monthly Property Custodian reports – to ensure 100% accuracy between the two.

2.4. ***Surplus/Excess Maintenance:*** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

- 2.4.1. Contractor shall be responsible for all updates to the official Asset Management system for all assets in the surplus-excess process.
- 2.4.2. Contractor shall be responsible for preparing official surplus reports at the direction of the USPTO's designated COTR/Task Manager.

2.5. **Computer Replacement Program (CRP) Maintenance:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.5.1. Contractor shall be responsible for all updates to the CRP code in the official Asset Management system for each designated Computer Processing Unit (CPU).

2.6. **Menu Configuration:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.6.1. Contractor shall be responsible for the maintenance of all Asset-related data fields that have drop-down menus in the Menu Configuration of the Asset Console. Maintenance will include additions, changes, and inactivating values that are no longer in use.

2.7. **Archive Administration:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.7.1. Contractor shall be responsible for archiving CFGs, CDs, and CTIs at the direction of the USPTO. Archiving will be executed in the Asset Console and in accordance with established business rules.

2.8. **EAMS User:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.8.1. Contractor shall be responsible for the maintenance of all new users (Users are either USPTO employees or designated contractor staff) being assigned assets at the USPTO. Maintenance will include additions, changes, and inactivating users that are no longer either at the USPTO or doing business with the USPTO.

2.9. **Technician Administration:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.9.1. Contractor shall be responsible for the maintenance of all new Technician (Tech) IDs (Tech IDs are issued for both USPTO employees and contractor staff) for those technicians who scan assets as part of their normal responsibilities at the USPTO. Maintenance will include additions, changes, and inactivating Tech IDs for technicians that are no longer either at the USPTO or doing business with the USPTO.

2.10. **Quality Assurance:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

- 2.10.1. Contractor shall be responsible for performing quality assurance verification on each of the designated Property Custodians on an annual basis.
 - 2.10.2. Verifications shall consist of physically observing and validating 10% of the assets on the custodian's current Property Custodian report and 10% of the assets found in the custodian's area to their current Property Custodian report.
 - 2.10.3. Verifications should be performed in a month other than the Property Custodian's designated required Certification submission.
 - 2.10.4. All verification efforts must be clearly documented for each Property Custodian and changes made to the system when deemed necessary.
 - 2.10.5. Property Custodian Quality Assurance package must be completed in the system and provided to the USPTO within two business days after completion of the verification.
 - 2.10.6. Verification statistics must be maintained for each custodian.
 - 2.10.7. Contractor shall be responsible for performing quality assurance verifications on each of the designated 'special' custodians on an-as-determined basis.
- 2.11. **Data Quality:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:
- 2.11.1. Contractor shall be responsible for performing weekly data quality field work to ensure the validity of the asset data is at a minimum of 95% accuracy at all times. Special emphasis should be placed on the following:
 - 2.11.1.1. Assets with "Not Accessible" in the serial number field
 - 2.11.1.2. Assets with "duplicate" serial numbers
 - 2.11.1.3. Assets with unusual" serial number configurations
- 2.12. **Financial Reconciliation:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:
- 2.12.1. Contractor shall be responsible for performing financial reconciliation activities for all assigned financial documents.
 - 2.12.2. Reconciliation activities will require interaction with designated USPTO employees, Property Custodians, and/or contractors doing business with the USPTO.
 - 2.12.3. Assigned orders must be completed within five business days from the assigned date unless circumstances beyond the contractor's control limit their ability to do so.
 - 2.12.4. Contractor shall be responsible for providing the USPTO with an official weekly status of all assigned orders.

- 2.12.5. Contractor shall be responsible for performing a monthly reconciliation of all Computer Replacement Program Delivery Orders to ensure 100% accuracy at all times.
- 2.13. ***Handheld and Radio Data Processing:*** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:
- 2.13.1. Contractor shall be responsible for processing handheld and radio transactions on a daily basis. All unprocessed transactions must be brought to the designated Technician's attention within 2 hours of processing for reconciliation.
 - 2.13.2. Contractor shall be responsible for ensuring all handheld and radio equipment have the current data tables installed on the units at least once a week.
 - 2.13.3. Contractor shall be responsible for establishing an electronic storage mechanism to maintain all processed and unprocessed transactions in raw form.
- 2.14. ***Standard and Custom Reports:*** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:
- 2.14.1. Contractor shall be responsible for maintaining all Asset Management reports available to the contractor at conception of the project.
 - 2.14.2. Contractor shall be responsible for maintaining the Asset Management Report library on as required basis.
 - 2.14.3. Contractor shall be responsible for creating new reports within four hours after request by the USPTO's designated COTR/Task Manager. In addition, all requests received by another USPTO employee or USPTO authorized contractor will require the designated COTR/Task Manager's approval before execution.
 - 2.14.4. Contractor shall be responsible for bringing all report discrepancies or opportunities for improvement to the USPTO's designated COTR/Task Manager's attention.
- 2.15. ***Training and Documentation:*** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:
- 2.15.1. Contractor shall be responsible for developing all training documentation and classes to support all Asset Management functions to the Inventory Support Team and Technicians utilizing the Handheld/Radio units.
 - 2.15.2. Contractor shall be responsible for providing training to all new employees and refresher training to existing employees to ensure 100% compliance and

accuracy of the Asset Management activities at all times.

- 2.16. **Asset Management:** The Contractor shall review daily reports on asset management activities (deployments, excess, moves, etc.) to ensure the proper use of the inventory system. Any discrepancies must be corrected with three (3) business days.
- 2.16.1. The contractor shall use the mobile (Psion) units to record all hardware changes for asset management purposes and to document all field service work performed.
- 2.16.2. The contractor shall perform an informal inventory certification once a quarter.
- 2.16.3. The contractor shall support the government in a formal certification as requested.
- 2.16.4. The contractor shall follow ISO certified procedures for all aspects of the warehouse operations.

3. GOVERNMENT FURNISHED MATERIAL

The Government shall furnish all equipment identified below:

- Hand-held Psion Units
- Two Computer workstations for the processing of HH transactions
- Two high-speed printers
-

In addition to equipment, the Government will furnish all paper requirements to support the printing of Property Custodian reports. Request for paper should be directed to the designated COTR/Task Manager.

4. LEVEL OF EFFORT

No work outside the scope of this Task Order will be performed without the written direction of the COTR. The Government reserves the right to de-scope this Task Order at any time.

5. PLACE OF PERFORMANCE

Work shall be performed throughout the various buildings occupied by the USPTO in Crystal City, VA; Springfield, VA; and Bailey's Crossroads, VA and in the contractor-leased facilities in Crystal City, VA; Alexandria, VA; and Horsham, PA.

6. SCHEDULE OF DELIVERABLES

Deliverable	Delivered To	Frequency
Discrepancy Listings 1. Unprocessed Transactions 2. Mis-scan Transactions	COTR/Task Manager or designee	Daily
Data Quality Reports	COTR/Task Manager or designee	Weekly
Financial Reconciliation Report	COTR/Task Manager or designee	Weekly
Property Custodian Reports	PAO/PC/Organization Reps	Monthly and as requested
Property Custodian Listing	COTR/Task Manager or designee	Monthly and as requested
Property Custodian Certification Reports	PAO/PC/Organization Reps	Quarterly
CTI Analysis	COTR/Task Manager or designee	Monthly
Verification Statistics of Quality Assurance efforts	COTR/Task Manager or designee	Monthly
Adhoc Asset Reports	COTR/Task Manager or designee	As Required
Statistic and Detail Reports for Monthly and Quarterly Certification Reports (see 2.1.4)	COTR/Task Manager or designee	Request + 4hrs
Surplus Reports	COTR/Task Manager or designee	As Required

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task.

8. TRAWICK RESPONSE

TO-11, September 2, 2002 – June 30, 2003 – Initial Statement of Work for the Inventory Support Task on the FMEUS 2 contract

TRAWICK proposes to perform the work specified in the Statement of Work for the period September 2, 2002 – June 30, 2003 with the following staffing level:

Labor Category



Quantity



DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

[Redacted] |
Total

The following table represents the functional responsibilities, staffing levels, labor categories selected to perform the work specified in the Statement of Work.

RESPONSIBILITIES MATRIX			
Function	Labor Category	Qty	Duties and Responsibilities
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

RESPONSIBILITIES MATRIX			
Function	Labor Category	Qty	Duties and Responsibilities
			[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]

DOCUMENT REDACTED
 EXEMPTION 4 FOIA
 5 USC § 552(b)(4)
 USPTO FOIA 03-169

A. **Resource Summary.** The following table provides a high level summary of all labor hours, labor costs and ODC costs for the period September 2, 2002 – June 30, 2003.

	Hours	Cost
[REDACTED]	[REDACTED]	[REDACTED]
TOTAL	[REDACTED]	\$594,268.80

B. Resources by labor category. The following table provides a detailed breakdown of labor hours and costs per labor category for the period September 2, 2002 - June 30, 2003.

Labor Category	Qty	Hours	Rate	Cost
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]
TOTAL				\$594,268.80

DOCUMENT REDACTED
EXEMPTION 4 FOIA
5 USC § 552(b)(4)
USPTO FOIA 03-169

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

1. CONTRACT ID CODE

Page
1 of 3

2. AMENDMENT/MODIFICATION NO. 0003	3. EFFECTIVE DATE 08/11/2004	4. REQUISITION/PURCHASE REQ. NO. See Funding Detail	5. PROJECT NO. (If applicable)
6. ISSUED BY Office of Procurement U.S. Patent and Trademark Office, 2011 Crystal Drive, Suite 810 Arlington, VA 22202		CODE 17	7. ADMINISTERED BY (If other than Item 6) CODE

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and Zip Code) Carol Trawick Trawick and Associates 6900 Wisconsin Avenue, Suite 400 Bethesda, MD 20815	9A. AMENDMENT OF SOLICITATION NO.
	9B. DATED (SEE ITEM 11)
	(X) 10A. MODIFICATION OF CONTRACT/ORDER NO. 50PAPT201025 / 56PAPT205061
	(X) 10B. DATED (SEE ITEM 13) 09/23/2002

CODE * FACILITY CODE

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers is extended, is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:

(a) By completing items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (If required)

See Funding Detail

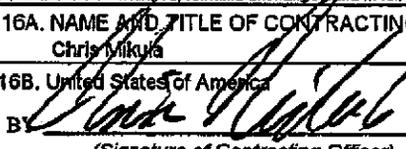
**13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS.
IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.**

CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
<input type="checkbox"/>	
<input type="checkbox"/>	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
<input type="checkbox"/>	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
<input checked="" type="checkbox"/>	D. OTHER (Specify type of modification and authority) The Task Order Clause of the Contract.

E. IMPORTANT: Contractor is not, is required to sign this document and return _____ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)
The purpose of this modification, MO03, to task order 56-PAPT-2-05061, is to provide additional funding. See attached for details.

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)	16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) Chris Mikula
15B. CONTRACTOR/OFFEROR	16B. United States of America
(Signature of person authorized to sign)	BY  (Signature of Contracting Officer)
15C. DATE SIGNED	16C. DATE SIGNED 8/11/04

Line Item Summary	Document Number 56PAPT205061/0003	Title Inventory Support TO-11 MO03	Page 2 of 3
--------------------------	---------------------------------------------	----------------------------------------------	-----------------------

FYs	Fund	Budget Org	Sub	Object Class	Sub	Program	Cost Org	Sub	Proj/Job No.	Sub	Reporting Category
Division	Closed FYs	Cancelled Fund									

Line Item Number	Description	Delivery Date (Start date to End date)	Quantity	Unit of Issue	Unit Price	Total Cost
------------------	-------------	-------------------------------------------	----------	---------------	------------	------------

This is Task Order 56-PAPT-2-05061/0003 to Contract No. 50-PAPT-2-01025 for the Inventory Support Task Order TO-11. The period of performance is through June 30, 2005.

No Changed Line Item Fields

Previous Total: \$1,781,072.64
Modification Total: \$4,119.60
Grand Total: \$1,785,192.24

Procurement P.O.C. Chris Mikula at (703) 305-8417. COTR, Jack Bowles at (703) 305-8823. Contractor P.O.C. [REDACTED]

EXEMPTION 4 (FOIA)
 5 USC Sec. 552(b)(4)

Contract Level Funding Summary	Document Number 56PAPT205061/0003	Title Inventory Support TO-11 M003	Page 3 of 3
-------------------------------------------	---------------------------------------------	----------------------------------------------	-----------------------

Funding Strip Code

Change in Funded Amount

2004 - - A - 291100 - - 2570 - - PZAF1 - 291310 - - - - NONCOMP - - - -

\$3,565.11

Reference Requisition: 291P0430343

2004 - - A - 292100 - - 2570 - - P51119 - 292212 - - - - NONCOMP - - - -

\$554.49

Reference Requisition: 291P0430343

INVENTORY SUPPORT TEAM
TASK ORDER TO-11 MO-03

CONTRACT NO.: 50-PAPT-2-01025 ORDER NO.: 56-PAPT-2-05061/0003
EFFECTIVE DATE: July 1, 2004
REQUISITION NO.: 291P0430343

ISSUED BY: U.S. PATENT AND TRADEMARK OFFICE
OFFICE OF PROCUREMENT
BOX 6
WASHINGTON, DC 20231

ISSUED TO: TRAWICK AND ASSOCIATES
6900 WISCONSON AVENUE
SUITE 400
BETHESDA, MD 20815

ACCOUNTING AND APPROPRIATION DATA:

291P0430343 2004 A 291100 2570 PZAF1 291310 - OBLIGATE \$3,565.11
291P0430343 2004 A 292100 2570 P51119 292212 - OBLIGATE \$554.49
TOTAL OBLIGATION \$4,119.60

Resources by labor category. The following table provides a detailed breakdown of labor hours and costs per labor category for Revision 1 in the period July 1, 2004 – June 30, 2005.

Labor Category	Comments	Qty	Hours	Rate	Cost
TOTAL					

Funding in the amount of \$4,119.60 is hereby added to this task order for the period of performance through June 30, 2005. Any funding required in excess of the funding obligated from this task order modification has been obligated on the original order, 56-PAPT-2-05061.

This task order is issued pursuant to the authority of the Contracting Officer and Special Contract Requirements, Clause H.17. TASK ORDERS PROCEDURES of the contract.

The contractor shall provide the necessary personnel and materials to accomplish this task in accordance with the statement of work, task list, and contractor work plan as approved and attached. The Contractor or any of its subcontractors shall not exceed the ceiling amount provided above in performance of this task order, without prior written approval and an executed modification to this task order.

The effective period of performance of this delivery/task order shall be from the effective date of this order through June 30, 2005, unless otherwise mutually agreed upon and properly modified by the Contracting Officer and Trawick and Associates.

EXEMPTION 4 (FOIA)
5 USC Sec. 552(b)(4)

Office of the Chief Information Officer FMEUS2 Statement of Work		
COTR	Task Title	Task Manager
Jack Bowles 305-8823 Tom King 305-8999	Inventory Support Team	Tom King 305-8999

1. BACKGROUND

The U.S. Patent and Trademark Office (USPTO) has the responsibility to implement and maintain an accountable asset management system. Accountability includes the safeguarding, financial reporting, and accurate physical location of an asset throughout its life span in the USPTO (i.e., from receipt through disposal).

On an annual basis, the Department of Commerce's Office of the Inspector General (OIG) performs a testing of the USPTO's accountable asset management system. Over the past several fiscal years, the USPTO has made considerable improvements to the system in an effort to ensure a favorable finding from the OIG.

The support required under this task order, in conjunction with the scanning performed under other task orders, is an integral part of the USPTO's accountable asset management system.

2. STATEMENT OF WORK

- 2.1. ***Inventory Support***: The contractor shall be responsible for the project management, oversight coordination, process and inventory support for the following activities:
- 2.1.1. Contractor shall be responsible for the execution of the Fiscal Year Asset Management guidelines and schedules of activities for all the organizations within the USPTO. The guidelines and schedules of activities will be determined by the USPTO's Asset Management Team and will be provided to the contractor – please refer to the CFO News/Asset Management folder for this fiscal year's documents. As changes are warranted, updates to these documents will be made by the Asset Management Team and will be subsequently posted to this folder.
 - 2.1.2. Contractor shall be responsible for the preparation and distribution of monthly Property Custodian report packages to all Property Custodians and/or Property Accountability Officers in accordance with the monthly report schedule. Report packages will include a monthly report cover sheet, monthly Property Custodian Report, and Transaction Report(s).
 - 2.1.3. Contractor shall be responsible for the preparation and distribution of the quarterly Property Custodian report packages to all Property Custodians and/or Property Accountability Officers in accordance with the quarterly report schedule. Report package will include a quarterly report cover sheet, Property Custodian Certification Report, and Transaction Report(s).

- 2.1.4. Contractor will be responsible for the development, maintenance and issuance of tracking documents to reflect statistics to support the Fiscal Year Asset Management guidelines and schedules of activities.
 - 2.1.5. Contractor shall be responsible for coordination and inventory support with asset movement and changes in Property Custodian assignment of responsibilities.
 - 2.1.6. Contractor shall be responsible for interacting with the designated Property Accountability Officers, Property Custodians, and designated point of contacts to answer their questions, and resolve inventory questions and discrepancies.
 - 2.1.7. Contractor shall be responsible for reviewing and coding of Property Custodian reports to ensure all updates are made correctly and within the required timeframes. Processing of these reports should be made with 95% accuracy and within 48 hours of receipt.
 - 2.1.8. Contractor will be responsible for managing and accounting for all Department of Commerce provided bar code labels (i.e., CD bar code labels).
 - 2.1.9. Contractor will be responsible for the creation and issuance of all non-Department of Commerce provided bar code labels (e.g., CFG, CFGH, CFGT, etc.)
 - 2.1.10. Contractor will be responsible for daily reconciliation of the "To Be Assigned" Property Custodian listing. Reconciliation should ensure that all assets are properly assigned to the designated Property Custodian, User, CFG, and location with 95% accuracy and within 48 hours.
 - 2.1.11. Contractor shall be responsible for updates to the official Asset Management system based on submitted asset management related forms to include the "Agreement/Authorization for Home Use of Assets" and "Transfer of Assets".
 - 2.1.12. Contractor shall be responsible for establishing a process to ensure that all equipment certified for Home Use is re-verified 30 days prior to the 'estimated return date.'
- 2.2. **Category, Type, Item (CTI) Maintenance:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:
- 2.2.1. Contractor shall be responsible for maintaining the current Category, Type, Item listing to include:
 - 2.2.1.1. Adding new asset descriptions as they are received for the 1st time at the USPTO (e.g., at the central warehouse, on-site of USPTO Campus, etc.).
 - 2.2.1.2. Consolidation of existing CTI as determined/approved by the USPTO
 - 2.2.1.3. Inactivating/Archiving existing CTI as determined/approved by the USPTO

- 2.2.1.4. Standardization of asset descriptions for existing and newly acquired assets.
- 2.2.1.5. As an initial effort, the contractor shall be responsible for performing a complete and thorough analysis of the existing CTI and identifying areas of improvement to the USPTO. All changes approved by the USPTO will be the contractor's responsibility to effect changes in the official Asset Management system. In addition, it's the USPTO's belief that this effort can be separated into two distinct efforts: (1) Consolidation of existing Item descriptions for like items and to correct known typographical errors; and (2) Thorough analysis of remaining CTI to include physical observation of assets to determine 'true' CTI of selected asset(s) before implementing changes. Of the USPTO's top priorities are the Item descriptions for the Types of Servers, CPUs, Monitors and Printers.

2.3. *Property Custodian Administration:* The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

- 2.3.1. Contractor shall be responsible for maintaining the current Official Property Custodian Listing to include:
 - 2.3.1.1. Adding all newly designated Property Custodians.
 - 2.3.1.2. Updating existing Property Custodians to reflect any change of information (e.g., Office Title, Property Accountability Officer, etc.)
 - 2.3.1.3. Realigning Property Custodians and their associated assets as requested.
 - 2.3.1.4. On a monthly basis, the contractor shall issue the Official Property Custodian Listing to all Organization Representatives on the Asset Management Team. This listing should be issued at the commencement of each month and coincide with the distribution of the monthly Property Custodian reports – to ensure 100% accuracy between the two.

2.4. *Surplus/Excess Maintenance:* The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

- 2.4.1. Contractor shall be responsible for all updates to the official Asset Management system for all assets in the surplus-excess process.
- 2.4.2. Contractor shall be responsible for preparing official surplus reports at the direction of the USPTO's designated COTR/Task Manager.

2.5. **Computer Replacement Program (CRP) Maintenance:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.5.1. Contractor shall be responsible for all updates to the CRP code in the official Asset Management system for each designated Computer Processing Unit (CPU).

2.6. **Menu Configuration:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.6.1. Contractor shall be responsible for the maintenance of all Asset-related data fields that have drop-down menus in the Menu Configuration of the Asset Console. Maintenance will include additions, changes, and inactivating values that are no longer in use.

2.7. **Archive Administration:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.7.1. Contractor shall be responsible for archiving CFGs, CDs, and CTIs at the direction of the USPTO. Archiving will be executed in the Asset Console and in accordance with established business rules.

2.8. **EAMS User:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.8.1. Contractor shall be responsible for the maintenance of all new users (Users are either USPTO employees or designated contractor staff) being assigned assets at the USPTO. Maintenance will include additions, changes, and inactivating users that are no longer either at the USPTO or doing business with the USPTO.

2.9. **Technician Administration:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.9.1. Contractor shall be responsible for the maintenance of all new Technician (Tech) IDs (Tech IDs are issued for both USPTO employees and contractor staff) for those technicians who scan assets as part of their normal responsibilities at the USPTO. Maintenance will include additions, changes, and inactivating Tech IDs for technicians that are no longer either at the USPTO or doing business with the USPTO.

2.10. **Quality Assurance:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

- 2.10.1. Contractor shall be responsible for performing quality assurance verification on each of the designated Property Custodians on an annual basis.
- 2.10.2. Verifications shall consist of physically observing and validating 10% of the assets on the custodian's current Property Custodian report and 10% of the assets found in the custodian's area to their current Property Custodian report.
- 2.10.3. Verifications should be performed in a month other than the Property Custodian's designated required Certification submission.
- 2.10.4. All verification efforts must be clearly documented for each Property Custodian and changes made to the system when deemed necessary.
- 2.10.5. Property Custodian Quality Assurance package must be completed in the system and provided to the USPTO within two business days after completion of the verification.
- 2.10.6. Verification statistics must be maintained for each custodian.
- 2.10.7. Contractor shall be responsible for performing quality assurance verifications on each of the designated 'special' custodians on an-as-determined basis.

2.11. **Data Quality:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

- 2.11.1. Contractor shall be responsible for performing weekly data quality field work to ensure the validity of the asset data is at a minimum of 95% accuracy at all times. Special emphasis should be placed on the following:
 - 2.11.1.1. Assets with "Not Accessible" in the serial number field
 - 2.11.1.2. Assets with "duplicate" serial numbers
 - 2.11.1.3. Assets with unusual" serial number configurations

2.12. **Financial Reconciliation:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

- 2.12.1. Contractor shall be responsible for performing financial reconciliation activities for all assigned financial documents.
- 2.12.2. Reconciliation activities will require interaction with designated USPTO employees, Property Custodians, and/or contractors doing business with the USPTO.

- 2.12.3. Assigned orders must be completed within five business days from the assigned date unless circumstances beyond the contractor's control limit their ability to do so.
 - 2.12.4. Contractor shall be responsible for providing the USPTO with an official weekly status of all assigned orders.
 - 2.12.5. Contractor shall be responsible for performing a monthly reconciliation of all Computer Replacement Program Delivery Orders to ensure 100% accuracy at all times.
- 2.13. ***Handheld and Radio Data Processing:*** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:
- 2.13.1. Contractor shall be responsible for processing handheld and radio transactions on a daily basis. All unprocessed transactions must be brought to the designated Technician's attention within 2 hours of processing for reconciliation.
 - 2.13.2. Contractor shall be responsible for ensuring all handheld and radio equipment have the current data tables installed on the units at least once a week.
 - 2.13.3. Contractor shall be responsible for establishing an electronic storage mechanism to maintain all processed and unprocessed transactions in raw form.
- 2.14. ***Standard and Custom Reports:*** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:
- 2.14.1. Contractor shall be responsible for maintaining all Asset Management reports available to the contractor at conception of the project.
 - 2.14.2. Contractor shall be responsible for maintaining the Asset Management Report library on as required basis.
 - 2.14.3. Contractor shall be responsible for creating new reports within four hours after request by the USPTO's designated COTR/Task Manager. In addition, all requests received by another USPTO employee or USPTO authorized contractor will require the designated COTR/Task Manager's approval before execution.
 - 2.14.4. Contractor shall be responsible for bringing all report discrepancies or opportunities for improvement to the USPTO's designated COTR/Task Manager's attention.
- 2.15. ***Training and Documentation:*** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

- 2.15.1. Contractor shall be responsible for developing all training documentation and classes to support all Asset Management functions to the Inventory Support Team and Technicians utilizing the Handheld/Radio units.
 - 2.15.2. Contractor shall be responsible for providing training to all new employees and refresher training to existing employees to ensure 100% compliance and accuracy of the Asset Management activities at all times.
- 2.16. **Asset Management:** The Contractor shall review daily reports on asset management activities (deployments, excess, moves, etc.) to ensure the proper use of the inventory system. Any discrepancies must be corrected with three (3) business days.
- 2.16.1. The contractor shall use the mobile handheld units to record all hardware changes for asset management purposes and to document all field service work performed.
 - 2.16.2. The contractor shall perform an informal inventory certification once a quarter.
 - 2.16.3. The contractor shall support the government in a formal certification as requested.
 - 2.16.4. The contractor shall follow ISO certified procedures for all aspects of the warehouse operations.

3. GOVERNMENT FURNISHED MATERIAL

The Government shall furnish all equipment identified below:

- Handheld Units and accessories
- Two Computer workstations for the processing of Handheld transactions
- One high-speed printers
-

In addition to equipment, the Government will furnish all paper requirements to support the printing of Property Custodian reports. Request for paper should be directed to the designated COTR/Task Manager.

4. LEVEL OF EFFORT

No work outside the scope of this Task Order will be performed without the written direction of the COTR. The Government reserves the right to de-scope this Task Order at any time.

5. PLACE OF PERFORMANCE

Work shall be performed throughout the various buildings occupied by the USPTO in Crystal City, VA; Springfield, VA; and Bailey's Crossroads, VA and in the contractor-leased facilities in Crystal City, VA; Alexandria, VA; and Horsham, PA.

6. SCHEDULE OF DELIVERABLES

Deliverable	Delivered To	Frequency
Discrepancy Listings 1. Unprocessed Transactions 2. Mis-scan Transactions	COTR/Task Manager or designee	Daily
Data Quality Reports	COTR/Task Manager or designee	Weekly
Financial Reconciliation Report	COTR/Task Manager or designee	Weekly
Property Custodian Reports	PAO/PC/Organization Reps	Monthly and as requested
Property Custodian Listing	COTR/Task Manager or designee	Monthly and as requested
Property Custodian Certification Reports	PAO/PC/Organization Reps	Quarterly
CTI Analysis	COTR/Task Manager or designee	Monthly
Verification Statistics of Quality Assurance efforts	COTR/Task Manager or designee	Monthly
Adhoc Asset Reports	COTR/Task Manager or designee	As Required
Statistic and Detail Reports for Monthly and Quarterly Certification Reports (see 2.1.4)	COTR/Task Manager or designee	Request + 4hrs
Surplus Reports	COTR/Task Manager or designee	As Required

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task.

8. TRAWICK RESPONSE

TO-11, July 1, 2004 – June 30, 2005 –Statement of Work for the Inventory Support Task on the FMEUS 2 contract

TRAWICK proposes to perform the work specified in the Statement of Work for the period July 1, 2004 – June 30, 2005 with the following staffing level:

Labor Category

Quantity



Total Core Staff

The following table represents the functional responsibilities, staffing levels, labor categories selected to perform the work specified in the Statement of Work.

RESPONSIBILITIES MATRIX			
Function	Labor Category	Qty	Duties and Responsibilities
Manager			Provides management oversight, coordination, process and inventory support to include Asset Management, Inventory Support and Warehouse Operations. TRAWICK believes it is necessary to have a senior level manager to provide direct management oversight and technical guidance for these diverse but connected tasks. Interacts with PAO's and PC's to resolve problems and answer questions.
Team Lead			Provides technical management oversight and technical guidance for the Data Entry, Auditor Financial Reconciliation segments of the task. Create, Issue and account for all Non-DOC barcode Labels. Develop, maintain and issue tracking documentation that reflects statistics in support of the Fiscal Year Asset Management guidelines and schedule of activities. In concert with PAO's and PC's resolve problems and answer questions.
DataEntry/Fld Tech			Provide data entry support for all areas of the Inventory support task. Also functions

RESPONSIBILITIES MATRIX			
Function	Labor Category	Only	Duties and Responsibilities
			as Field Techs when workload requires. Handles distribution of all reports.
Auditor/Field Tech			Preparation of reports and report packages. Perform daily asset reconciliation. Perform quality assurance verification on units identified on a quarterly and annual basis. Maintain verification stats. Perform weekly data quality checks to ensure asset data quality. Manage and account for all DOC provided barcode labels.
Finance/Audit Tech			Provide updates to the Asset Mgmt Sys for all assets in the surplus-excess process, and prepare official surplus reports upon request. Provide management oversight for all archiving activity. Perform financial reconciliation activities and prepare reports.
Trainer/Crystal Rpts			Maintain all Asset Mgmt reports and Report Library. Create new reports using the Report Writer system identified by the PTO. Develop and maintain training classes for Asset Mgmt functions and handheld/radio units. Provide initial and refresher training for new and existing staff in Asset Mgmt and handheld/radio unit use.
Asset Manager			The Contractor shall review daily reports on asset management activities (deployments, excess, moves, etc.) to ensure the proper use of the inventory system. Any discrepancies must be corrected with three (3) business days.
Asset audit/ Verification			On-campus support for verifying and auditing daily transactions in EAMS and RADAR. Follow up on all daily transactional discrepancies, at times re-scanning (on site).
Sr. Field Engineer (Carlyle move support from Sept 2004 – June 2005)			Pre-audit team member that inventories the assets 3 days prior to scheduled move date. Assist with reconciliation project for missing assets. Scan assets that are to be moved that are not on the pre-audit inventory report. Generate a pre-audit

RESPONSIBILITIES MATRIX			
Function	Labor Category	Qty	Duties and Responsibilities
			inventory report.

- A. **Resource Summary.** The following table provides a high level summary of all labor hours, labor costs and ODC costs for the period July 1, 2004 – June 30, 2005.

	Hours	Cost
Labor		
ODCs		
TOTAL		

EXEMPTION 4 (FOIA)
5 USC Sec. 552(b)(4)

B. **Resources by labor category.** The following table provides a detailed breakdown of labor hours and costs per labor category for the period July 1, 2004 – June 30, 2005.

Labor Category	Comments	Qty	Hours	Rate	Cost
	Carlyle Move from Sept 1-June 30, 2005				
TOTAL					

REVISION 1, TO-11, July 1, 2004 – June 30, 2005 – Statement of Work for Revision 1 of the Inventory Support Task – FMEUS2 contract

Additional hours added for cross-training of the Financial Staff in IST.

A. **Resource Summary.** The following table provides a high level summary of all labor hours, labor costs and ODC costs for Revision 1 in the period July 1, 2004 – June 30, 2005.

	Hours	Cost
Labor		
ODCs		
TOTAL		

EXEMPTION 4 (FOIA)
5 USC Sec. 552(b)(4)

B. **Resources by labor category.** The following table provides a detailed breakdown of labor hours and costs per labor category for Revision 1 in the period July 1, 2004 – June 30, 2005.

Labor Category	Comments	Qty	Hours	Rate	Cost
[REDACTED]					
TOTAL					

EXEMPTION 4 (FOIA)
5 USC Sec. 552(b)(4)

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

1. CONTRACT ID CODE

Page
1 of 2

2. AMENDMENT/MODIFICATION NO. 0004	3. EFFECTIVE DATE 01/28/2005	4. REQUISITION/PURCHASE REQ. NO. See Funding Detail	5. PROJECT NO. (If applicable)
6. ISSUED BY Office of Procurement S. Patent and Trademark Office, 2011 Crystal Drive, Suite 810 Arlington, VA 22202		CODE 17	7. ADMINISTERED BY (If other than Item 6) CODE

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and Zip Code) Carol Trawick Trawick and Associates 6900 Wisconsin Avenue, Suite 400 Bethesda, MD 20815	9A. AMENDMENT OF SOLICITATION NO.
	9B. DATED (SEE ITEM 11)
	(X) 10A. MODIFICATION OF CONTRACT/ORDER NO. 50PAPT201025 / 56PAPT205061
	(X) 10B. DATED (SEE ITEM 13) 09/23/2002
CODE	FACILITY CODE

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers is extended, is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:
 (a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

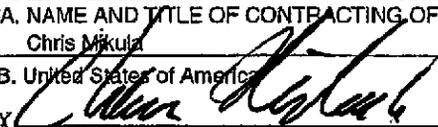
12. ACCOUNTING AND APPROPRIATION DATA (If required)
See Funding Detail

**13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS.
IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.**

CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
<input type="checkbox"/>	
<input type="checkbox"/>	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
<input type="checkbox"/>	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
<input checked="" type="checkbox"/>	D. OTHER (Specify type of modification and authority) The Task Order Clause of the Contract.

E. IMPORTANT: Contractor is not, is required to sign this document and return _____ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)
The purpose of this modification, MO04, to task order 56-PAPT-2-05061, is to perform an administrative action and issue a No-Cost Task Order Modification with existing funds. See attached for details.

15A. NAME AND TITLE OF SIGNER (Type or print)		16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) Chris Mikula	
15B. CONTRACTOR/OFFEROR (Signature of person authorized to sign)	15C. DATE SIGNED	16B. United States of America BY  (Signature of Contracting Officer)	16C. DATE SIGNED 1/28/05

Line Item Summary	Document Number 56PAPT205061/0004	Title Inventory Support TO-11 MO04	Page 2 of 2
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Line Item Number	Description	Delivery Date (Start date to End date)	Quantity	Unit of Issue	Unit Price	Total Cost
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This is Task Order 56-PAPT-2-05061/0004 to Contract No. 50-PAPT-2-01025 for the Inventory Support Task Order TO-11. The period of performance is through June 30, 2005.

No Changed Line Item Fields

Previous Total: \$1,785,192.24
Modification Total: \$0.00
Grand Total: \$1,785,192.24

Procurement P.O.C. Chris Mikula at (703) 305-8417. COTR, Jack Bowles at (703) 305-8823. Contractor P.O.C. [REDACTED]

EXEMPTION 4 (FOIA)
5 USC Sec. 552(b)(4)

INVENTORY SUPPORT TEAM
TASK ORDER TO-11/MO04

CONTRACT NO.: 50-PAPT-2-01025 ORDER NO.: 56-PAPT-2-05061/0004
EFFECTIVE DATE: February 7, 2005
REQUISITION NO.: No-Cost Task Order Modification with Existing Funds

ISSUED BY: U.S. PATENT AND TRADEMARK OFFICE
OFFICE OF PROCUREMENT
BOX 6
WASHINGTON, DC 20231

ISSUED TO: TRAWICK AND ASSOCIATES
6900 WISCONSON AVENUE
SUITE 400
BETHESDA, MD 20815

ACCOUNTING AND APPROPRIATION DATA:

No-Cost Task Order Modification with Existing Funds

TOTAL OBLIGATION \$42,366.92

REVISION 2, TO-11, February 7, 2005 – June 30, 2005 – Statement of Work for Revision 1 of the Inventory Support Task – FMEUS2 contract

This response addresses changes to the Statement of Work introduced in Section 2.17.

Resource Summary. The following table provides a high level summary of all labor hours, labor costs and ODC costs for Revision 2 in the period February 7, 2005 – June 30, 2005.

Description	Hours	Cost
Financial Support as per Section 2.17	N/A	

Funding in the amount of \$42,366.92 is hereby added to this task order for the period of performance through June 30, 2005. Any funding required in excess of the funding obligated from this task order modification has been obligated on the original order, 56-PAPT-2-05061.

EXEMPTION 4 (FOIA
5 USC Sec. 552(b)(4))

This task order is issued pursuant to the authority of the Contracting Officer and Special Contract Requirements, Clause H.17. TASK ORDERS PROCEDURES of the contract.

The contractor shall provide the necessary personnel and materials to accomplish this task in accordance with the statement of work, task list, and contractor work plan as approved and attached. The Contractor or any of its subcontractors shall not exceed the ceiling amount provided above in performance of this task order, without prior written approval and an executed modification to this task order.

The effective period of performance of this delivery/task order shall be from the effective date of this order through June 30, 2005, unless otherwise mutually agreed upon and properly modified by the Contracting Officer and Trawick and Associates.

Office of the Chief Information Officer FMBUS2 Statement of Work		
COTR	Task Title	Task Manager
Jack Bowles 571-272-5407 Tom King 571-272-5419	Inventory Support Team	Tom King 571-272-5419

1. BACKGROUND

The U.S. Patent and Trademark Office (USPTO) has the responsibility to implement and maintain an accountable asset management system. Accountability includes the safeguarding, financial reporting, and accurate physical location of an asset throughout its life span in the USPTO (i.e., from receipt through disposal).

On an annual basis, the Department of Commerce's Office of the Inspector General (OIG) performs a testing of the USPTO's accountable asset management system. Over the past several fiscal years, the USPTO has made considerable improvements to the system in an effort to ensure a favorable finding from the OIG.

The support required under this task order, in conjunction with the scanning performed under other task orders, is an integral part of the USPTO's accountable asset management system.

2. STATEMENT OF WORK

2.1. **Inventory Support:** The contractor shall be responsible for the project management, oversight coordination, process and inventory support for the following activities:

- 2.1.1. Contractor shall be responsible for the execution of the Fiscal Year Asset Management guidelines and schedules of activities for all the organizations within the USPTO. The guidelines and schedules of activities will be determined by the USPTO's Asset Management Team and will be provided to the contractor – please refer to the CFO News/Asset Management folder for this fiscal year's documents. As changes are warranted, updates to these documents will be made by the Asset Management Team and will be subsequently posted to this folder.
- 2.1.2. Contractor shall be responsible for the preparation and distribution of monthly Property Custodian report packages to all Property Custodians and/or Property Accountability Officers in accordance with the monthly report schedule. Report packages will include a monthly report cover sheet, monthly Property Custodian Report, and Transaction Report(s).
- 2.1.3. Contractor shall be responsible for the preparation and distribution of the quarterly Property Custodian report packages to all Property Custodians and/or Property Accountability Officers in accordance with the quarterly report schedule. Report package will include a quarterly report cover sheet, Property Custodian Certification Report, and Transaction Report(s).

- 2.1.4. Contractor will be responsible for the development, maintenance and issuance of tracking documents to reflect statistics to support the Fiscal Year Asset Management guidelines and schedules of activities.
- 2.1.5. Contractor shall be responsible for coordination and inventory support with asset movement and changes in Property Custodian assignment of responsibilities.
- 2.1.6. Contractor shall be responsible for interacting with the designated Property Accountability Officers, Property Custodians, and designated point of contacts to answer their questions, and resolve inventory questions and discrepancies.
- 2.1.7. Contractor shall be responsible for reviewing and coding of Property Custodian reports to ensure all updates are made correctly and within the required timeframes. Processing of these reports should be made with 95% accuracy and within 48 hours of receipt.
- 2.1.8. Contractor will be responsible for managing and accounting for all Department of Commerce provided bar code labels (i.e., CD bar code labels).
- 2.1.9. Contractor will be responsible for the creation and issuance of all non-Department of Commerce provided bar code labels (e.g., CFG, CFGH, CFGT, etc.)
- 2.1.10. Contractor will be responsible for daily reconciliation of the "To Be Assigned" Property Custodian listing. Reconciliation should ensure that all assets are properly assigned to the designated Property Custodian, User, CFG, and location with 95% accuracy and within 48 hours.
- 2.1.11. Contractor shall be responsible for updates to the official Asset Management system based on submitted asset management related forms to include the "Agreement/Authorization for Home Use of Assets" and "Transfer of Assets".
- 2.1.12. Contractor shall be responsible for establishing a process to ensure that all equipment certified for Home Use is re-verified 30 days prior to the 'estimated return date.'

2.2. **Category, Type, Item (CTI) Maintenance:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

- 2.2.1. Contractor shall be responsible for maintaining the current Category, Type, Item listing to include:
 - 2.2.1.1. Adding new asset descriptions as they are received for the 1st time at the USPTO (e.g., at the central warehouse, on-site of USPTO Campus, etc.).
 - 2.2.1.2. Consolidation of existing CTI as determined/approved by the USPTO
 - 2.2.1.3. Inactivating/Archiving existing CTI as determined/approved by the USPTO

- 2.2.1.4. Standardization of asset descriptions for existing and newly acquired assets.
- 2.2.1.5. As an initial effort, the contractor shall be responsible for performing a complete and thorough analysis of the existing CTI and identifying areas of improvement to the USPTO. All changes approved by the USPTO will be the contractor's responsibility to effect changes in the official Asset Management system. In addition, it's the USPTO's belief that this effort can be separated into two distinct efforts: (1) Consolidation of existing Item descriptions for like items and to correct known typographical errors; and (2) Thorough analysis of remaining CTI to include physical observation of assets to determine 'true' CTI of selected asset(s) before implementing changes. Of the USPTO's top priorities are the Item descriptions for the Types of Servers, CPUs, Monitors and Printers.

2.3. ***Property Custodian Administration:*** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

- 2.3.1. Contractor shall be responsible for maintaining the current Official Property Custodian Listing to include:
 - 2.3.1.1. Adding all newly designated Property Custodians.
 - 2.3.1.2. Updating existing Property Custodians to reflect any change of information (e.g., Office Title, Property Accountability Officer, etc.)
 - 2.3.1.3. Realigning Property Custodians and their associated assets as requested.
 - 2.3.1.4. On a monthly basis, the contractor shall issue the Official Property Custodian Listing to all Organization Representatives on the Asset Management Team. This listing should be issued at the commencement of each month and coincide with the distribution of the monthly Property Custodian reports – to ensure 100% accuracy between the two.

2.4. ***Surplus/Excess Maintenance:*** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

- 2.4.1. Contractor shall be responsible for all updates to the official Asset Management system for all assets in the surplus-excess process.
- 2.4.2. Contractor shall be responsible for preparing official surplus reports at the direction of the USPTO's designated COTR/Task Manager.

2.5. Computer Replacement Program (CRP) Maintenance: The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.5.1. Contractor shall be responsible for all updates to the CRP code in the official Asset Management system for each designated Computer Processing Unit (CPU).

2.6. Menu Configuration: The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.6.1. Contractor shall be responsible for the maintenance of all Asset-related data fields that have drop-down menus in the Menu Configuration of the Asset Console. Maintenance will include additions, changes, and inactivating values that are no longer in use.

2.7. Archive Administration: The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.7.1. Contractor shall be responsible for archiving CFGs, CDs, and CTIs at the direction of the USPTO. Archiving will be executed in the Asset Console and in accordance with established business rules.

2.8. EAMS User: The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.8.1. Contractor shall be responsible for the maintenance of all new users (Users are either USPTO employees or designated contractor staff) being assigned assets at the USPTO. Maintenance will include additions, changes, and inactivating users that are no longer either at the USPTO or doing business with the USPTO.

2.9. Technician Administration: The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.9.1. Contractor shall be responsible for the maintenance of all new Technician (Tech) IDs (Tech IDs are issued for both USPTO employees and contractor staff) for those technicians who scan assets as part of their normal responsibilities at the USPTO. Maintenance will include additions, changes, and inactivating Tech IDs for technicians that are no longer either at the USPTO or doing business with the USPTO.

2.10. **Quality Assurance:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

- 2.10.1. Contractor shall be responsible for performing quality assurance verification on each of the designated Property Custodians on an annual basis.
- 2.10.2. Verifications shall consist of physically observing and validating 10% of the assets on the custodian's current Property Custodian report and 10% of the assets found in the custodian's area to their current Property Custodian report.
- 2.10.3. Verifications should be performed in a month other than the Property Custodian's designated required Certification submission.
- 2.10.4. All verification efforts must be clearly documented for each Property Custodian and changes made to the system when deemed necessary.
- 2.10.5. Property Custodian Quality Assurance package must be completed in the system and provided to the USPTO within two business days after completion of the verification.
- 2.10.6. Verification statistics must be maintained for each custodian.
- 2.10.7. Contractor shall be responsible for performing quality assurance verifications on each of the designated 'special' custodians on an-as-determined basis.

2.11. **Data Quality:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

- 2.11.1. Contractor shall be responsible for performing weekly data quality field work to ensure the validity of the asset data is at a minimum of 95% accuracy at all times. Special emphasis should be placed on the following:
 - 2.11.1.1. Assets with "Not Accessible" in the serial number field
 - 2.11.1.2. Assets with "duplicate" serial numbers
 - 2.11.1.3. Assets with unusual" serial number configurations

2.12. **Financial Reconciliation:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

- 2.12.1. Contractor shall be responsible for performing financial reconciliation activities for all assigned financial documents.
- 2.12.2. Reconciliation activities will require interaction with designated USPTO employees, Property Custodians, and/or contractors doing business with the USPTO.

- 2.12.3. Assigned orders must be completed within five business days from the assigned date unless circumstances beyond the contractor's control limit their ability to do so.
 - 2.12.4. Contractor shall be responsible for providing the USPTO with an official weekly status of all assigned orders.
 - 2.12.5. Contractor shall be responsible for performing a monthly reconciliation of all Computer Replacement Program Delivery Orders to ensure 100% accuracy at all times.
- 2.13. ***Handheld and Radio Data Processing:*** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:
- 2.13.1. Contractor shall be responsible for processing handheld and radio transactions on a daily basis. All unprocessed transactions must be brought to the designated Technician's attention within 2 hours of processing for reconciliation.
 - 2.13.2. Contractor shall be responsible for ensuring all handheld and radio equipment have the current data tables installed on the units at least once a week.
 - 2.13.3. Contractor shall be responsible for establishing an electronic storage mechanism to maintain all processed and unprocessed transactions in raw form.
- 2.14. ***Standard and Custom Reports:*** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:
- 2.14.1. Contractor shall be responsible for maintaining all Asset Management reports available to the contractor at conception of the project.
 - 2.14.2. Contractor shall be responsible for maintaining the Asset Management Report library on as required basis.
 - 2.14.3. Contractor shall be responsible for creating new reports within four hours after request by the USPTO's designated COTR/Task Manager. In addition, all requests received by another USPTO employee or USPTO authorized contractor will require the designated COTR/Task Manager's approval before execution.
 - 2.14.4. Contractor shall be responsible for bringing all report discrepancies or opportunities for improvement to the USPTO's designated COTR/Task Manager's attention.
- 2.15. ***Training and Documentation:*** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

- 2.15.1. Contractor shall be responsible for developing all training documentation and classes to support all Asset Management functions to the Inventory Support Team and Technicians utilizing the Handheld/Radio units.
- 2.15.2. Contractor shall be responsible for providing training to all new employees and refresher training to existing employees to ensure 100% compliance and accuracy of the Asset Management activities at all times.
- 2.16. **Asset Management:** The Contractor shall review daily reports on asset management activities (deployments, excess, moves, etc.) to ensure the proper use of the inventory system. Any discrepancies must be corrected with three (3) business days.
 - 2.16.1. The contractor shall use the mobile handheld units to record all hardware changes for asset management purposes and to document all field service work performed.
 - 2.16.2. The contractor shall perform an informal inventory certification once a quarter.
 - 2.16.3. The contractor shall support the government in a formal certification as requested.
 - 2.16.4. The contractor shall follow ISO certified procedures for all aspects of the warehouse operations.
- 2.17. **Financial Management:** The Contractor shall serve as Financial Management subject area expert with emphasis in the purchasing chain for Momentum Financials and the implementation of the Acquisitions subsystem in the Momentum Financials 6x upgrade effort. In support of the Acquisition subsystem, emphasis will also include the FedBizOps (FBO), FPDS-NG, and Vender Self Service (VSS) integrations and the conversion of data from the current automated Procurement system, Procurement Desktop (PD), to Momentum Acquisitions. All deliverables and testing activities will be assigned in writing (email) by the Director of the Financial Systems Division, the Implementation Project Lead or their designee. All hardware, software and office space required under this portion of the task order will be provided by the USPTO. The period of performance for this section is February 7, 2005 through June 30, 2005.
 - 2.17.1. The contractor shall review and comment on functional deliverables in support of implementing the Acquisition subsystem to include FBO, FPDS-NG, VSS and PD conversion.
 - 2.17.2. The contractor shall conduct system testing in support of the Momentum Financials upgrade to version 6.x.
 - 2.17.3. The contractor shall attend meetings, including weekly status meetings with Director of the Financial Systems Division, the Implementation Project Lead or their designee, in support of assigned functional deliverables and system testing activities.
 - 2.17.4. The contractor shall provide a Monthly Status Report with the following:

- Hours/days worked during the designated month.
- Deliverables assigned and hours worked on each.
- Status of assignments assigned during the designated month.

3. GOVERNMENT FURNISHED MATERIAL

The Government shall furnish all equipment identified below:

- Handheld Units and accessories
- Two Computer workstations for the processing of Handheld transactions
- One high-speed printers

In addition to equipment, the Government will furnish all paper requirements to support the printing of Property Custodian reports. Request for paper should be directed to the designated COTR/Task Manager.

4. LEVEL OF EFFORT

No work outside the scope of this Task Order will be performed without the written direction of the COTR. The Government reserves the right to de-scope this Task Order at any time.

5. PLACE OF PERFORMANCE

Work shall be performed throughout the various buildings occupied by the USPTO in Carlyle, VA; Crystal City, VA; Springfield, VA; and Bailey's Crossroads, VA and in the contractor-leased facilities in Crystal City, VA; Alexandria, VA; and Horsham, PA.

6. SCHEDULE OF DELIVERABLES

Deliverable	Delivered To	Frequency
Discrepancy Listings 1. Unprocessed Transactions 2. Mis-scan Transactions	COTR/Task Manager or designee	Daily
Data Quality Reports	COTR/Task Manager or designee	Weekly
Financial Reconciliation Report	COTR/Task Manager or designee	Weekly
Property Custodian Reports	PAO/PC/Organization Reps	Monthly and as requested
Property Custodian Listing	COTR/Task Manager or designee	Monthly and as requested
Property Custodian Certification Reports	PAO/PC/Organization Reps	Quarterly
CTI Analysis	COTR/Task Manager or designee	Monthly
Verification Statistics of Quality Assurance efforts	COTR/Task Manager or designee	Monthly
Adhoc Asset Reports	COTR/Task Manager or designee	As Required
Statistic and Detail Reports for Monthly and Quarterly Certification Reports (see 2.1.4)	COTR/Task Manager or designee	Request + 4hrs
Surplus Reports	COTR/Task Manager or designee	As Required

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task.

8. TRAWICK RESPONSE

TO-11, July 1, 2004 – June 30, 2005 –Statement of Work for the Inventory Support Task on the FMEUS 2 contract

TRAWICK proposes to perform the work specified in the Statement of Work for the period July 1, 2004 – June 30, 2005 with the following staffing level:

Labor Category Quantity

--	--



Total Core Staff

The following table represents the functional responsibilities, staffing levels, labor categories selected to perform the work specified in the Statement of Work.

RESPONSIBILITIES MATRIX			
Function	Labor Category	Qty	Duties and Responsibilities
Manager			Provides management oversight, coordination, process and inventory support to include Asset Management, Inventory Support and Warehouse Operations. TRAWICK believes it is necessary to have a senior level manager to provide direct management oversight and technical guidance for these diverse but connected tasks. Interacts with PAO's and PC's to resolve problems and answer questions.
Team Lead			Provides technical management oversight and technical guidance for the Data Entry, Auditor Financial Reconciliation segments of the task. Create, Issue and account for all Non-DOC barcode Labels. Develop, maintain and issue tracking documentation that reflects statistics in support of the Fiscal Year Asset Management guidelines and schedule of activities. In concert with PAO's and PC's resolve problems and answer questions.
DataEntry/Fld Tech			Provide data entry support for all areas of the Inventory support task. Also functions as Field Techs when workload requires. Handles distribution of all reports.

RESPONSIBILITIES MATRIX			
Function	Labor Category	Only	Duties and Responsibilities
Auditor/Field Tech			Preparation of reports and report packages. Perform daily asset reconciliation. Perform quality assurance verification on units identified on a quarterly and annual basis. Maintain verification stats. Perform weekly data quality checks to ensure asset data quality. Manage and account for all DOC provided barcode labels.
Finance/Audit Tech			Provide updates to the Asset Mgmt Sys for all assets in the surplus-excess process, and prepare official surplus reports upon request. Provide management oversight for all archiving activity. Perform financial reconciliation activities and prepare reports.
Trainer/Crystal Rpts			Maintain all Asset Mgmt reports and Report Library. Create new reports using the Report Writer system identified by the PTO. Develop and maintain training classes for Asset Mgmt functions and handheld/radio units. Provide initial and refresher training for new and existing staff in Asset Mgmt and handheld/radio unit use.
Asset Manager			The Contractor shall review daily reports on asset management activities (deployments, excess, moves, etc.) to ensure the proper use of the inventory system. Any discrepancies must be corrected with three (3) business days.
Asset audit/ Verification			On-campus support for verifying and auditing daily transactions in EAMS and RADAR. Follow up on all daily transactional discrepancies, at times re-scanning (on site).
Sr. Field Engineer (Carlyle move support from Sept 2004 – June 2005)			Pre-audit team member that inventories the assets 3 days prior to scheduled move date. Assist with reconciliation project for missing assets. Scan assets that are to be moved that are not on the pre-audit inventory report. Generate a pre-audit inventory report.

EXEMPTION 4 (FOIA)
5 USC Sec. 552(b)(4)

- A. **Resource Summary.** The following table provides a high level summary of all labor hours, labor costs and ODC costs for the period July 1, 2004 – June 30, 2005.

	Hours	Cost
Labor		
ODCs		
TOTAL		

EXEMPTION 4 (FOIA)
5 USC Sec. 552(b)(4)

B. Resources by labor category. The following table provides a detailed breakdown of labor hours and costs per labor category for the period July 1, 2004 – June 30, 2005.

Labor Category	Comments	Qty	Hours	Rate	Cost
	Carlyle Move from Sept 1-June 30, 2005				
TOTAL					

REVISION 1, TO-11, July 1, 2004 – June 30, 2005 – Statement of Work for Revision 1 of the Inventory Support Task – FMEUS2 contract

Additional hours added for cross-training of the Financial Staff in IST.

A. Resource Summary. The following table provides a high level summary of all labor hours, labor costs and ODC costs for Revision 1 in the period July 1, 2004 – June 30, 2005.

	Hours	Cost
Labor		
ODCs		
TOTAL		

EXEMPTION 4 (FOIA)
5- USC Sec. 552(b)(4)

B. Resources by labor category. The following table provides a detailed breakdown of labor hours and costs per labor category for Revision 1 in the period July 1, 2004 – June 30, 2005.

Labor Category	Comments	Qty	Hours	Rate	Cost
TOTAL					

REVISION 2, TO-11, February 7, 2005 – June 30, 2005 – Statement of Work for Revision 1 of the Inventory Support Task – FMEUS2 contract

This response addresses changes to the Statement of Work introduced in Section 2.17.

A. Resource Summary. The following table provides a high level summary of all labor hours, labor costs and ODC costs for Revision 2 in the period February 7, 2005 – June 30, 2005.

Description	Hours	Cost
Financial Support as per Section 2.17	N/A	

EXEMPTION 4 (FOIA)
5 USC Sec. 552(b)(4)

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

1. CONTRACT ID CODE

Page
1 of 3

2. AMENDMENT/MODIFICATION NO. 0005
 3. EFFECTIVE DATE 06/21/2005
 4. REQUISITION/PURCHASE REQ. NO. See Funding Detail
 5. PROJECT NO. (If applicable)

6. ISSUED BY CODE 1
 Office of Procurement
 US Patent and Trademark Office, PO Box 1450-Mail Stop 6,600 Dulany
 St., MDE, 7th Floor
 ALEXANDRIA, VA 22313-1450
 7. ADMINISTERED BY (If other than Item 6) CODE

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and Zip Code)
 Carol Trawlck
 Trawlck and Associates
 6900 Wisconsin Avenue, Suite 400
 Bethesda, MD 20815
 9A. AMENDMENT OF SOLICITATION NO.
 9B. DATED (SEE ITEM 11)
 (X) 10A. MODIFICATION OF CONTRACT/ORDER NO. 50PAPT201025 / 56PAPT205061
 (X) 10B. DATED (SEE ITEM 13) 09/23/2002
 CODE * FACILITY CODE

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers is extended, is not extended.

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(a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

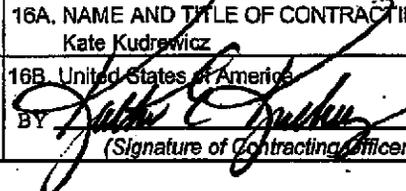
12. ACCOUNTING AND APPROPRIATION DATA (If required)
 2005 - - A - 183400 - - 3118 - - CZMAB1 - 183400 - - - - NONCOMP - - - - \$49,998.65

13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE
 A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
 B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
 C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
 D. OTHER (Specify type of modification and authority)
 The Task Order Clause of the Contract.

E. IMPORTANT: Contractor is not, is required to sign this document and return _____ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)
 The purpose of this modification, MO05, to task order 56-PAPT-2-05061, is to provide additional funding and extend the period of performance. See attached for details.

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.
 15A. NAME AND TITLE OF SIGNER (Type or print) Kate Kudrawicz
 15B. CONTRACTOR/OFFEROR
 15C. DATE SIGNED
 16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) Kate Kudrawicz
 16B. United States of America
 BY  (Signature of Contracting Officer)
 16C. DATE SIGNED 6/22/05
 (Signature of person authorized to sign)

Line Item Summary	Document Number 56PAPT205061/0005	Title Inventory Support TO-11 MO05	Page 2 of 3
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FYs **Fund** **Budget Org** **Sub** **Object Class** **Sub** **Program** **Cost Org** **Sub** **Proj/Job No.** **Sub** **Reporting Category**
Division **Closed FYs** **Cancelled Fund**

Line Item Number	Description	Delivery Date (Start date to End date)	Quantity	Unit of Issue	Unit Price	Total Cost
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This is Task Order 56-PAPT-2-05061/0005 to Contract No. 50-PAPT-2-01025 for the Inventory Support Task Order TO-11. The period of performance is through June 30, 2005.

No Changed Line Item Fields

Previous Total: \$1,785,192.24
Modification Total: \$49,998.65
Grand Total: \$1,835,190.89

Procurement P.O.C. Joe Troia at (571) 272-8407. COTR, Jack Bowles at (703) 305-8823. Contractor P.O.C. [REDACTED]

EXEMPTION 4 (FOIA)
 5 USC Sec. 552(b)(4)

**Contract Level
Funding Summary**

Document Number
56PAPT205061/0005

Title
Inventory Support TO-11 MO05

Page
3 of 3

Funding Strip Code

2005 - - A - 183400 - - 3118 - - CZMAB1 - 183400 - - - - NONCOMP - - - -

Change in Funded Amount

\$49,998.65

Reference Requisition: 183P0530412

INVENTORY SUPPORT TEAM
TASK ORDER TO-11/MO05

CONTRACT NO.: 50-PAPT-2-01025 ORDER NO.: 56-PAPT-2-05061/0005
EFFECTIVE DATE: June 21, 2005
REQUISITION NO.: 183P0530412

ISSUED BY: U.S. PATENT AND TRADEMARK OFFICE
OFFICE OF PROCUREMENT
BOX 6
WASHINGTON, DC 20231

ISSUED TO: TRAWICK AND ASSOCIATES
6900 WISCONSON AVENUE
SUITE 400
BETHESDA, MD 20815

ACCOUNTING AND APPROPRIATION DATA:
183P0530412 2005 A 183400 3118 CZMAB1 183400 OBLIGATION: \$49,998.65
TOTAL OBLIGATION \$49,998.65

REVISION 3, TO-11, February 7, 2005 – June 30, 2005 – Statement of Work for the Inventory Support Task – FMEUS2 contract

This response addresses changes to the Statement of Work introduced in Section 2.17.

- A. **Resource Summary.** The following table provides a high level summary of all labor hours, labor costs and ODC costs for Revision 3 in the period February 7, 2005 – June 30, 2005.

Description	Hours	Cost
Financial Support as per Section 2.17		

Office of the Chief Information Officer FMEUS2 Statement of Work		
COTR	Task Title	Task Manager
Jack Bowles 571-272-5407	Inventory Support Team	Tom King 571-272-5419
Tom King 571-272-5419		

1. BACKGROUND

The U.S. Patent and Trademark Office (USPTO) has the responsibility to implement and maintain an accountable asset management system. Accountability includes the safeguarding, financial reporting, and accurate physical location of an asset throughout its life span in the USPTO (i.e., from receipt through disposal).

EXEMPTION 4 (FOIA)
5 USC Sec. 552(b)(4)

On an annual basis, the Department of Commerce's Office of the Inspector General (OIG) performs a testing of the USPTO's accountable asset management system. Over the past several fiscal years, the USPTO has made considerable improvements to the system in an effort to ensure a favorable finding from the OIG.

The support required under this task order, in conjunction with the scanning performed under other task orders, is an integral part of the USPTO's accountable asset management system.

2. STATEMENT OF WORK

- 2.1. ***Inventory Support***: The contractor shall be responsible for the project management, oversight coordination, process and inventory support for the following activities:
- 2.1.1. Contractor shall be responsible for the execution of the Fiscal Year Asset Management guidelines and schedules of activities for all the organizations within the USPTO. The guidelines and schedules of activities will be determined by the USPTO's Asset Management Team and will be provided to the contractor – please refer to the CFO News/Asset Management folder for this fiscal year's documents. As changes are warranted, updates to these documents will be made by the Asset Management Team and will be subsequently posted to this folder.
 - 2.1.2. Contractor shall be responsible for the preparation and distribution of monthly Property Custodian report packages to all Property Custodians and/or Property Accountability Officers in accordance with the monthly report schedule. Report packages will include a monthly report cover sheet, monthly Property Custodian Report, and Transaction Report(s).
 - 2.1.3. Contractor shall be responsible for the preparation and distribution of the quarterly Property Custodian report packages to all Property Custodians and/or Property Accountability Officers in accordance with the quarterly report schedule. Report package will include a quarterly report cover sheet, Property Custodian Certification Report, and Transaction Report(s).
 - 2.1.4. Contractor will be responsible for the development, maintenance and issuance of tracking documents to reflect statistics to support the Fiscal Year Asset Management guidelines and schedules of activities.
 - 2.1.5. Contractor shall be responsible for coordination and inventory support with asset movement and changes in Property Custodian assignment of responsibilities.
 - 2.1.6. Contractor shall be responsible for interacting with the designated Property Accountability Officers, Property Custodians, and designated point of contacts to answer their questions, and resolve inventory questions and discrepancies.
 - 2.1.7. Contractor shall be responsible for reviewing and coding of Property Custodian reports to ensure all updates are made correctly and within the

required timeframes. Processing of these reports should be made with 95% accuracy and within 48 hours of receipt.

- 2.1.8. Contractor will be responsible for managing and accounting for all Department of Commerce provided bar code labels (i.e., CD bar code labels).
- 2.1.9. Contractor will be responsible for the creation and issuance of all non-Department of Commerce provided bar code labels (e.g., CFG, CFGH, CFGT, etc.)
- 2.1.10. Contractor will be responsible for daily reconciliation of the "To Be Assigned" Property Custodian listing. Reconciliation should ensure that all assets are properly assigned to the designated Property Custodian, User, CFG, and location with 95% accuracy and within 48 hours.
- 2.1.11. Contractor shall be responsible for updates to the official Asset Management system based on submitted asset management related forms to include the "Agreement/Authorization for Home Use of Assets" and "Transfer of Assets".
- 2.1.12. Contractor shall be responsible for establishing a process to ensure that all equipment certified for Home Use is re-verified 30 days prior to the 'estimated return date.'

2.2. Category, Type, Item (CTI) Maintenance: The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

- 2.2.1. Contractor shall be responsible for maintaining the current Category, Type, Item listing to include:
 - 2.2.1.1. Adding new asset descriptions as they are received for the 1st time at the USPTO (e.g., at the central warehouse, on-site of USPTO Campus, etc.).
 - 2.2.1.2. Consolidation of existing CTI as determined/approved by the USPTO
 - 2.2.1.3. Inactivating/Archiving existing CTI as determined/approved by the USPTO
 - 2.2.1.4. Standardization of asset descriptions for existing and newly acquired assets.
 - 2.2.1.5. As an initial effort, the contractor shall be responsible for performing a complete and thorough analysis of the existing CTI and identifying areas of improvement to the USPTO. All changes approved by the USPTO will be the contractor's responsibility to effect changes in the official Asset Management system. In addition, it's the USPTO's belief that this effort can be separated into two distinct efforts: (1) Consolidation of existing Item descriptions for like items and to correct known typographical errors; and (2) Thorough analysis of remaining CTI to include physical observation of assets to

determine 'true' CTI of selected asset(s) before implementing changes. Of the USPTO's top priorities are the Item descriptions for the Types of Servers, CPUs, Monitors and Printers.

2.3. *Property Custodian Administration:* The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.3.1. Contractor shall be responsible for maintaining the current Official Property Custodian Listing to include:

2.3.1.1. Adding all newly designated Property Custodians.

2.3.1.2. Updating existing Property Custodians to reflect any change of information (e.g., Office Title, Property Accountability Officer, etc.)

2.3.1.3. Realigning Property Custodians and their associated assets as requested.

2.3.1.4. On a monthly basis, the contractor shall issue the Official Property Custodian Listing to all Organization Representatives on the Asset Management Team. This listing should be issued at the commencement of each month and coincide with the distribution of the monthly Property Custodian reports – to ensure 100% accuracy between the two.

2.4. *Surplus/Excess Maintenance:* The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.4.1. Contractor shall be responsible for all updates to the official Asset Management system for all assets in the surplus-excess process.

2.4.2. Contractor shall be responsible for preparing official surplus reports at the direction of the USPTO's designated COTR/Task Manager.

2.5. *Computer Replacement Program (CRP) Maintenance:* The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.5.1. Contractor shall be responsible for all updates to the CRP code in the official Asset Management system for each designated Computer Processing Unit (CPU).

2.6. *Menu Configuration:* The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

- 2.6.1. Contractor shall be responsible for the maintenance of all Asset-related data fields that have drop-down menus in the Menu Configuration of the Asset Console. Maintenance will include additions, changes, and inactivating values that are no longer in use.
- 2.7. **Archive Administration:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:
 - 2.7.1. Contractor shall be responsible for archiving CFGs, CDs, and CTIs at the direction of the USPTO. Archiving will be executed in the Asset Console and in accordance with established business rules.
- 2.8. **EAMS User:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:
 - 2.8.1. Contractor shall be responsible for the maintenance of all new users (Users are either USPTO employees or designated contractor staff) being assigned assets at the USPTO. Maintenance will include additions, changes, and inactivating users that are no longer either at the USPTO or doing business with the USPTO.
- 2.9. **Technician Administration:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:
 - 2.9.1. Contractor shall be responsible for the maintenance of all new Technician (Tech) IDs (Tech IDs are issued for both USPTO employees and contractor staff) for those technicians who scan assets as part of their normal responsibilities at the USPTO. Maintenance will include additions, changes, and inactivating Tech IDs for technicians that are no longer either at the USPTO or doing business with the USPTO.
- 2.10. **Quality Assurance:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:
 - 2.10.1. Contractor shall be responsible for performing quality assurance verification on each of the designated Property Custodians on an annual basis.
 - 2.10.2. Verifications shall consist of physically observing and validating 10% of the assets on the custodian's current Property Custodian report and 10% of the assets found in the custodian's area to their current Property Custodian report.
 - 2.10.3. Verifications should be performed in a month other than the Property Custodian's designated required Certification submission.

- 2.10.4. All verification efforts must be clearly documented for each Property Custodian and changes made to the system when deemed necessary.
 - 2.10.5. Property Custodian Quality Assurance package must be completed in the system and provided to the USPTO within two business days after completion of the verification.
 - 2.10.6. Verification statistics must be maintained for each custodian.
 - 2.10.7. Contractor shall be responsible for performing quality assurance verifications on each of the designated 'special' custodians on an-as-determined basis.
- 2.11. **Data Quality:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:
- 2.11.1. Contractor shall be responsible for performing weekly data quality field work to ensure the validity of the asset data is at a minimum of 95% accuracy at all times. Special emphasis should be placed on the following:
 - 2.11.1.1. Assets with "Not Accessible" in the serial number field
 - 2.11.1.2. Assets with "duplicate" serial numbers
 - 2.11.1.3. Assets with unusual" serial number configurations
- 2.12. **Financial Reconciliation:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:
- 2.12.1. Contractor shall be responsible for performing financial reconciliation activities for all assigned financial documents.
 - 2.12.2. Reconciliation activities will require interaction with designated USPTO employees, Property Custodians, and/or contractors doing business with the USPTO.
 - 2.12.3. Assigned orders must be completed within five business days from the assigned date unless circumstances beyond the contractor's control limit their ability to do so.
 - 2.12.4. Contractor shall be responsible for providing the USPTO with an official weekly status of all assigned orders.
 - 2.12.5. Contractor shall be responsible for performing a monthly reconciliation of all Computer Replacement Program Delivery Orders to ensure 100% accuracy at all times.
- 2.13. **Handheld and Radio Data Processing:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:
- 2.13.1. Contractor shall be responsible for processing handheld and radio transactions on a daily basis. All unprocessed transactions must be

- brought to the designated Technician's attention within 2 hours of processing for reconciliation.
- 2.13.2. Contractor shall be responsible for ensuring all handheld and radio equipment have the current data tables installed on the units at least once a week.
 - 2.13.3. Contractor shall be responsible for establishing an electronic storage mechanism to maintain all processed and unprocessed transactions in raw form.
- 2.14. ***Standard and Custom Reports:*** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:
- 2.14.1. Contractor shall be responsible for maintaining all Asset Management reports available to the contractor at conception of the project.
 - 2.14.2. Contractor shall be responsible for maintaining the Asset Management Report library on as required basis.
 - 2.14.3. Contractor shall be responsible for creating new reports within four hours after request by the USPTO's designated COTR/Task Manager. In addition, all requests received by another USPTO employee or USPTO authorized contractor will require the designated COTR/Task Manager's approval before execution.
 - 2.14.4. Contractor shall be responsible for bringing all report discrepancies or opportunities for improvement to the USPTO's designated COTR/Task Manager's attention.
- 2.15. ***Training and Documentation:*** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:
- 2.15.1. Contractor shall be responsible for developing all training documentation and classes to support all Asset Management functions to the Inventory Support Team and Technicians utilizing the Handheld/Radio units.
 - 2.15.2. Contractor shall be responsible for providing training to all new employees and refresher training to existing employees to ensure 100% compliance and accuracy of the Asset Management activities at all times.
- 2.16. ***Asset Management:*** The Contractor shall review daily reports on asset management activities (deployments, excess, moves, etc.) to ensure the proper use of the inventory system. Any discrepancies must be corrected with three (3) business days.
- 2.16.1. The contractor shall use the mobile handheld units to record all hardware changes for asset management purposes and to document all field service work performed.

- 2.16.2. The contractor shall perform an informal inventory certification once a quarter.
- 2.16.3. The contractor shall support the government in a formal certification as requested.
- 2.16.4. The contractor shall follow ISO certified procedures for all aspects of the warehouse operations.

2.17. ***Financial Management:*** The Contractor shall serve as Financial Management subject area expert with emphasis in the purchasing chain for Momentum Financials and the implementation of the Acquisitions subsystem in the Momentum Financials 6x upgrade effort. In support of the Acquisition subsystem, emphasis will also include the FedBizOps (FBO), FPDS-NG, and Vender Self Service (VSS) integrations and the conversion of data from the current automated Procurement system, Procurement Desktop (PD), to Momentum Acquisitions. All deliverables and testing activities will be assigned in writing (email) by the Director of the Financial Systems Division, the Implementation Project Lead or their designee. All hardware, software and office space required under this portion of the task order will be provided by the USPTO. The period of performance for this section is February 7, 2005 through June 30, 2005.

- 2.17.1. The contractor shall review and comment on functional deliverables in support of implementing the Acquisition subsystem to include FBO, FPDS-NG, VSS and PD conversion.
- 2.17.2. The contractor shall conduct system testing in support of the Momentum Financials upgrade to version 6.x.
- 2.17.3. The contractor shall attend meetings, including weekly status meetings with Director of the Financial Systems Division, the Implementation Project Lead or their designee, in support of assigned functional deliverables and system testing activities.
- 2.17.4. The contractor shall provide a Monthly Status Report with the following:
 - Hours/days worked during the designated month.
 - Deliverables assigned and hours worked on each.
 - Status of assignments assigned during the designated month.

3. **GOVERNMENT FURNISHED MATERIAL**

The Government shall furnish all equipment identified below:

- Handheld Units and accessories
- Two Computer workstations for the processing of Handheld transactions
- One high-speed printers

In addition to equipment, the Government will furnish all paper requirements to support the printing of Property Custodian reports. Request for paper should be directed to the designated COTR/Task Manager.

4. LEVEL OF EFFORT

No work outside the scope of this Task Order will be performed without the written direction of the COTR. The Government reserves the right to de-scope this Task Order at any time.

5. PLACE OF PERFORMANCE

Work shall be performed throughout the various buildings occupied by the USPTO in Carlyle, VA; Crystal City, VA; Springfield, VA; and Bailey's Crossroads, VA and in the contractor-leased facilities in Crystal City, VA; Alexandria, VA; and Horsham, PA.

6. SCHEDULE OF DELIVERABLES

Deliverable	Delivered To	Frequency
Discrepancy Listings 1. Unprocessed Transactions 2. Mis-scan Transactions	COTR/Task Manager or designee	Daily
Data Quality Reports	COTR/Task Manager or designee	Weekly
Financial Reconciliation Report	COTR/Task Manager or designee	Weekly
Property Custodian Reports	PAO/PC/Organization Reps	Monthly and as requested
Property Custodian Listing	COTR/Task Manager or designee	Monthly and as requested
Property Custodian Certification Reports	PAO/PC/Organization Reps	Quarterly
CTI Analysis	COTR/Task Manager or designee	Monthly
Verification Statistics of Quality Assurance efforts	COTR/Task Manager or designee	Monthly
Adhoc Asset Reports	COTR/Task Manager or designee	As Required
Statistic and Detail Reports for Monthly and Quarterly Certification Reports (see 2.1.4)	COTR/Task Manager or designee	Request + 4hrs
Surplus Reports	COTR/Task Manager or designee	As Required

7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task.

8. TRAWICK RESPONSE

TO-11, July 1, 2004 – June 30, 2005 – Statement of Work for the Inventory Support Task on the FMEUS 2 contract

TRAWICK proposes to perform the work specified in the Statement of Work for the period July 1, 2004 – June 30, 2005 with the following staffing level:

Labor Category	Quantity
	







Total Core Staff

The following table represents the functional responsibilities, staffing levels, labor categories selected to perform the work specified in the Statement of Work.

RESPONSIBILITIES MATRIX			
Function	Labor Category	Qty	Duties and Responsibilities
Manager			Provides management oversight, coordination, process and inventory support to include Asset Management, Inventory Support and Warehouse Operations. TRAWICK believes it is necessary to have a senior level manager to provide direct management oversight and technical guidance for these diverse but connected tasks. Interacts with PAO's and PC's to resolve problems and answer questions.
Team Lead			Provides technical management oversight and technical guidance for the Data Entry, Auditor Financial Reconciliation segments of the task. Create, Issue and account for all Non-DOC barcode Labels. Develop, maintain and issue tracking documentation that reflects statistics in support of the Fiscal Year Asset Management guidelines and schedule of activities. In concert with PAO's and PC's resolve problems and answer questions.
DataEntry/Fld Tech			Provide data entry support for all areas of the Inventory support task. Also functions as Field Techs when workload requires. Handles distribution of all reports.

RESPONSIBILITIES MATRIX		
Function	Labor Category	Duties and Responsibilities
Auditor/Field Tech		Preparation of reports and report packages. Perform daily asset reconciliation. Perform quality assurance verification on units identified on a quarterly and annual basis. Maintain verification stats. Perform weekly data quality checks to ensure asset data quality. Manage and account for all DOC provided barcode labels.
Finance/Audit Tech		Provide updates to the Asset Mgmt Sys for all assets in the surplus-excess process, and prepare official surplus reports upon request. Provide management oversight for all archiving activity. Perform financial reconciliation activities and prepare reports.
Trainer/Crystal Rpts		Maintain all Asset Mgmt reports and Report Library. Create new reports using the Report Writer system identified by the PTO. Develop and maintain training classes for Asset Mgmt functions and handheld/radio units. Provide initial and refresher training for new and existing staff in Asset Mgmt and handheld/radio unit use.
Asset Manager		The Contractor shall review daily reports on asset management activities (deployments, excess, moves, etc.) to ensure the proper use of the inventory system. Any discrepancies must be corrected with three (3) business days.
Asset audit/ Verification		On-campus support for verifying and auditing daily transactions in EAMS and RADAR. Follow up on all daily transactional discrepancies, at times re-scanning (on site).
Sr. Field Engineer (Carlyle move support from Sept 2004 – June 2005)		Pre-audit team member that inventories the assets 3 days prior to scheduled move date. Assist with reconciliation project for missing assets. Scan assets that are to be moved that are not on the pre-audit inventory report. Generate a pre-audit inventory report.

EXEMPTION 4 (FOIA)
5 USC Sec. 552(b)(4)

- A. **Resource Summary.** The following table provides a high level summary of all labor hours, labor costs and ODC costs for the period July 1, 2004 – June 30, 2005.

	Hours	Cost
Labor		
ODCs		
TOTAL		

EXEMPTION 4 (FOIA)
5 USC Sec. 552(b)(4)

- B. **Resources by labor category.** The following table provides a detailed breakdown of labor hours and costs per labor category for the period July 1, 2004 – June 30, 2005.

Labor Category	Comments	Qty	Hours	Rate	Cost
	Carlyle Move from Sept 1-June 30, 2005				
TOTAL					

REVISION 1, TO-11, July 1, 2004 – June 30, 2005 – Statement of Work for Revision 1 of the Inventory Support Task – FMEUS2 contract

Additional hours added for cross-training of the Financial Staff in IST.

- A. **Resource Summary.** The following table provides a high level summary of all labor hours, labor costs and ODC costs for Revision 1 in the period July 1, 2004 – June 30, 2005.

	Hours	Cost
Labor		
ODCs		
TOTAL		

EXEMPTION 4 (FOIA)
5 USC Sec. 552(b)(4)

B. **Resources by labor category.** The following table provides a detailed breakdown of labor hours and costs per labor category for Revision 1 in the period July 1, 2004 – June 30, 2005.

Labor Category	Comments	Qty	Hours	Rate	Cost
TOTAL					

REVISION 2, TO-11, February 7, 2005 – June 30, 2005 – Statement of Work for the Inventory Support Task – FMEUS2 contract

This response addresses changes to the Statement of Work introduced in Section 2.17.

B. **Resource Summary.** The following table provides a high level summary of all labor hours, labor costs and ODC costs for Revision 2 in the period February 7, 2005 – June 30, 2005.

Description	Hours	Cost
Financial Support as per Section 2.17	N/A	

REVISION 3, TO-11, February 7, 2005 – June 30, 2005 – Statement of Work for the Inventory Support Task – FMEUS2 contract

This response addresses changes to the Statement of Work introduced in Section 2.17.

C. **Resource Summary.** The following table provides a high level summary of all labor hours, labor costs and ODC costs for Revision 3 in the period February 7, 2005 – June 30, 2005.

Description	Hours	Cost
Financial Support as per Section 2.17		

EXEMPTION 4 (FOIA)
5 USC Sec. 552(b)(4)

2. AMENDMENT/MODIFICATION NO. 0006	3. EFFECTIVE DATE 07/21/2005	4. REQUISITION/PURCHASE REQ. NO. See Funding Detail	5. PROJECT NO. (If applicable)
---------------------------------------	---------------------------------	--------------------------------------------------------	--------------------------------

6. ISSUED BY Office of Procurement US Patent and Trademark Office, PO Box 1450-Mail Stop 6,600 Dulany St.,MDE, 7th Floor ALEXANDRIA, VA 22313-1450	CODE 1	7. ADMINISTERED BY (If other than Item 6)	CODE
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8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and Zip Code) Carol Trawick Trawick and Associates 6900 Wisconsin Avenue, Suite 400 Bethesda, MD 20815		9A. AMENDMENT OF SOLICITATION NO.
		9B. DATED (SEE ITEM 11)
	(X)	10A. MODIFICATION OF CONTRACT/ORDER NO. 50PAPT201025 / 56PAPT205061
	(X)	10B. DATED (SEE ITEM 13) 09/23/2002

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers is extended, is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:
 (a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. **FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER.** If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (If required)
 2005 - - A - 188270 - - 2570 - - 010304 - 188270 - - - - NONCOMP - - - - \$790,598.40

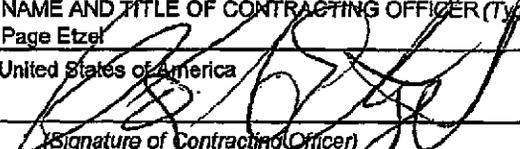
13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS. IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.

CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
<input type="checkbox"/>	
<input type="checkbox"/>	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
<input type="checkbox"/>	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
<input checked="" type="checkbox"/>	D. OTHER (Specify type of modification and authority) The Task Order Clause of the Contract.

E. IMPORTANT: Contractor is not, is required to sign this document and return _____ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)
 The purpose of this modification, MO06, to task order 56-PAPT-2-05061, is to provide additional funding and to extend the period of performance. See attached for details.

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)	16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) Page Etzel
15B. CONTRACTOR/OFFEROR	16B. United States of America
(Signature of person authorized to sign)	BY  (Signature of Contracting Officer)
15C. DATE SIGNED	16C. DATE SIGNED 7/21/05

Line Item Summary	Document Number 56PAPT205061/0006	Title Inventory Support TO-11 MO06	Page 2 of 3
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FYs	Fund	Budget Org	Sub	Object Class	Sub	Program	Cost Org	Sub	Proj/Job No.	Sub	Reporting Category
Division	Closed FYs	Cancelled Fund									

Line Item Number	Description	Delivery Date (Start date to End date)	Quantity	Unit of Issue	Unit Price	Total Cost
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This is Task Order 56-PAPT-2-05061/0006 to Contract No. 50-PAPT-2-01025 for the Inventory Support Task Order TO-11. The period of performance is July 1, 2005 through June 30, 2006.

No Changed Line Item Fields

Previous Total: \$1,835,190.89
Modification Total: \$790,598.40
Grand Total: \$2,625,789.29

Procurement P.O.C. Joe Troia at (571) 272-8407. COTR, Jack Bowles at (703) 305-8823. Contractor P.O.C. XXXXXXXXXX

EXEMPTION 4 (FOIA)
5 USC Sec. 552(b)(4)

Contract Level Funding Summary	Document Number 56PAPT205061/0006	Title Inventory Support TO-11 MO06	Page 3 of 3
-------------------------------------------	---------------------------------------------	----------------------------------------------	-----------------------

Funding Strip Code

2005 - - A - 188270 - - 2570 - - 010304 - 188270 - - - - NONCOMP - - - -

Change in Funded Amount

\$790,598.40

Reference Requisition: 188P0530545

INVENTORY SUPPORT TEAM
TASK ORDER TO-11/MO06

CONTRACT NO.: 50-PAPT-2-01025 ORDER NO.: 56-PAPT-2-05061/0006
EFFECTIVE DATE: July 19, 2005
REQUISITION NO.: 188P0530545

ISSUED BY: U.S. PATENT AND TRADEMARK OFFICE
OFFICE OF PROCUREMENT
600 DULANY ST, MDE 7D44
ALEXANDRIA, VA 22313-1450

ISSUED TO: TRAWICK AND ASSOCIATES
6900 WISCONSON AVENUE
SUITE 400
BETHESDA, MD 20815

ACCOUNTING AND APPROPRIATION DATA:
188P0530545 2005 A 188270 2570 010304 188270 OBLIGATION: \$790,598.40
TOTAL OBLIGATION \$790,598.40

A. **Resource Summary.** The following table provides a high level summary of all labor hours, labor costs and ODC costs for the period July 1, 2005 – June 30, 2006.

	Hours	Cost
Labor		
ODCs		
TOTAL		

EXEMPTION 4 (FOIA)
5 USC Sec. 552(b)(4)

Office of the Chief Information Officer FMEUS2 Statement of Work		
COTR	Task Title	Task Manager
Jack Bowles 571-272-5407	Inventory Support Team	Tom King 571-272-5419
Tom King 571-272-5419		

1. BACKGROUND

The U.S. Patent and Trademark Office (USPTO) has the responsibility to implement and maintain an accountable asset management system. Accountability includes the safeguarding, financial reporting, and accurate physical location of an asset throughout its life span in the USPTO (i.e., from receipt through disposal).

On an annual basis, the Department of Commerce's Office of the Inspector General (OIG) performs a testing of the USPTO's accountable asset management system. Over

the past several fiscal years, the USPTO has made considerable improvements to the system in an effort to ensure a favorable finding from the OIG.

The support required under this task order, in conjunction with the scanning performed under other task orders, is an integral part of the USPTO's accountable asset management system.

2. STATEMENT OF WORK

- 2.1. Inventory Support:** The contractor shall be responsible for the project management, oversight coordination, process and inventory support for the following activities:
- 2.1.1. Contractor shall be responsible for the execution of the Fiscal Year Asset Management guidelines and schedules of activities for all the organizations within the USPTO. The guidelines and schedules of activities will be determined by the USPTO's Asset Management Team and will be provided to the contractor – please refer to the CFO News/Asset Management folder for this fiscal year's documents. As changes are warranted, updates to these documents will be made by the Asset Management Team and will be subsequently posted to this folder.
 - 2.1.2. Contractor shall be responsible for the preparation and distribution of monthly Property Custodian report packages to all Property Custodians and/or Property Accountability Officers in accordance with the monthly report schedule. Report packages will include a monthly report cover sheet, monthly Property Custodian Report, and Transaction Report(s).
 - 2.1.3. Contractor shall be responsible for the preparation and distribution of the quarterly Property Custodian report packages to all Property Custodians and/or Property Accountability Officers in accordance with the quarterly report schedule. Report package will include a quarterly report cover sheet, Property Custodian Certification Report, and Transaction Report(s).
 - 2.1.4. Contractor will be responsible for the development, maintenance and issuance of tracking documents to reflect statistics to support the Fiscal Year Asset Management guidelines and schedules of activities.
 - 2.1.5. Contractor shall be responsible for coordination and inventory support with asset movement and changes in Property Custodian assignment of responsibilities.
 - 2.1.6. Contractor shall be responsible for interacting with the designated Property Accountability Officers, Property Custodians, and designated point of contacts to answer their questions, and resolve inventory questions and discrepancies.
 - 2.1.7. Contractor shall be responsible for reviewing and coding of Property Custodian reports to ensure all updates are made correctly and within the required timeframes. Processing of these reports should be made with 95% accuracy and within 48 hours of receipt.

- 2.1.8. Contractor will be responsible for managing and accounting for all Department of Commerce provided bar code labels (i.e., CD bar code labels).
- 2.1.9. Contractor will be responsible for the creation and issuance of all non-Department of Commerce provided bar code labels (e.g., CFG, CFGH, CFGT, etc.)
- 2.1.10. Contractor will be responsible for daily reconciliation of the "To Be Assigned" Property Custodian listing. Reconciliation should ensure that all assets are properly assigned to the designated Property Custodian, User, CFG, and location with 95% accuracy and within 48 hours.
- 2.1.11. Contractor shall be responsible for updates to the official Asset Management system based on submitted asset management related forms to include the "Agreement/Authorization for Home Use of Assets" and "Transfer of Assets".
- 2.1.12. Contractor shall be responsible for establishing a process to ensure that all equipment certified for Home Use is re-verified 30 days prior to the 'estimated return date.'

2.2. Category, Type, Item (CTI) Maintenance: The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

- 2.2.1. Contractor shall be responsible for maintaining the current Category, Type, Item listing to include:
 - 2.2.1.1. Adding new asset descriptions as they are received for the 1st time at the USPTO (e.g., at the central warehouse, on-site of USPTO Campus, etc.).
 - 2.2.1.2. Consolidation of existing CTI as determined/approved by the USPTO
 - 2.2.1.3. Inactivating/Archiving existing CTI as determined/approved by the USPTO
 - 2.2.1.4. Standardization of asset descriptions for existing and newly acquired assets.
 - 2.2.1.5. As an initial effort, the contractor shall be responsible for performing a complete and thorough analysis of the existing CTI and identifying areas of improvement to the USPTO. All changes approved by the USPTO will be the contractor's responsibility to effect changes in the official Asset Management system. In addition, it's the USPTO's belief that this effort can be separated into two distinct efforts: (1) Consolidation of existing Item descriptions for like items and to correct known typographical errors; and (2) Thorough analysis of remaining CTI to include physical observation of assets to determine 'true' CTI of selected asset(s) before implementing changes. Of the USPTO's top priorities are the Item

descriptions for the Types of Servers, CPUs, Monitors and Printers.

2.3. *Property Custodian Administration:* The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

- 2.3.1. Contractor shall be responsible for maintaining the current Official Property Custodian Listing to include:
 - 2.3.1.1. Adding all newly designated Property Custodians.
 - 2.3.1.2. Updating existing Property Custodians to reflect any change of information (e.g., Office Title, Property Accountability Officer, etc.)
 - 2.3.1.3. Realigning Property Custodians and their associated assets as requested.
 - 2.3.1.4. On a monthly basis, the contractor shall issue the Official Property Custodian Listing to all Organization Representatives on the Asset Management Team. This listing should be issued at the commencement of each month and coincide with the distribution of the monthly Property Custodian reports – to ensure 100% accuracy between the two.

2.4. *Surplus/Excess Maintenance:* The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

- 2.4.1. Contractor shall be responsible for all updates to the official Asset Management system for all assets in the surplus-excess process.
- 2.4.2. Contractor shall be responsible for preparing official surplus reports at the direction of the USPTO's designated COTR/Task Manager.

2.5. *Computer Replacement Program (CRP) Maintenance:* The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

- 2.5.1. Contractor shall be responsible for all updates to the CRP code in the official Asset Management system for each designated Computer Processing Unit (CPU).

2.6. *Menu Configuration:* The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

- 2.6.1. Contractor shall be responsible for the maintenance of all Asset-related data fields that have drop-down menus in the Menu Configuration of the

Asset Console. Maintenance will include additions, changes, and inactivating values that are no longer in use.

2.7. *Archive Administration:* The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.7.1. Contractor shall be responsible for archiving CFGs, CDs, and CTIs at the direction of the USPTO. Archiving will be executed in the Asset Console and in accordance with established business rules.

2.8. *EAMS User:* The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.8.1. Contractor shall be responsible for the maintenance of all new users (Users are either USPTO employees or designated contractor staff) being assigned assets at the USPTO. Maintenance will include additions, changes, and inactivating users that are no longer either at the USPTO or doing business with the USPTO.

2.9. *Technician Administration:* The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.9.1. Contractor shall be responsible for the maintenance of all new Technician (Tech) IDs (Tech IDs are issued for both USPTO employees and contractor staff) for those technicians who scan assets as part of their normal responsibilities at the USPTO. Maintenance will include additions, changes, and inactivating Tech IDs for technicians that are no longer either at the USPTO or doing business with the USPTO.

2.10. *Quality Assurance:* The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.10.1. Contractor shall be responsible for performing quality assurance verification on each of the designated Property Custodians on an annual basis.

2.10.2. Verifications shall consist of physically observing and validating 10% of the assets on the custodian's current Property Custodian report and 10% of the assets found in the custodian's area to their current Property Custodian report.

2.10.3. Verifications should be performed in a month other than the Property Custodian's designated required Certification submission.

2.10.4. All verification efforts must be clearly documented for each Property Custodian and changes made to the system when deemed necessary.

- 2.10.5. Property Custodian Quality Assurance package must be completed in the system and provided to the USPTO within two business days after completion of the verification.
 - 2.10.6. Verification statistics must be maintained for each custodian.
 - 2.10.7. Contractor shall be responsible for performing quality assurance verifications on each of the designated 'special' custodians on an-as-determined basis.
- 2.11. **Data Quality:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:
- 2.11.1. Contractor shall be responsible for performing weekly data quality field work to ensure the validity of the asset data is at a minimum of 95% accuracy at all times. Special emphasis should be placed on the following:
 - 2.11.1.1. Assets with "Not Accessible" in the serial number field
 - 2.11.1.2. Assets with "duplicate" serial numbers
 - 2.11.1.3. Assets with unusual" serial number configurations
- 2.12. **Financial Reconciliation:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:
- 2.12.1. Contractor shall be responsible for performing financial reconciliation activities for all assigned financial documents.
 - 2.12.2. Reconciliation activities will require interaction with designated USPTO employees, Property Custodians, and/or contractors doing business with the USPTO.
 - 2.12.3. Assigned orders must be completed within five business days from the assigned date unless circumstances beyond the contractor's control limit their ability to do so.
 - 2.12.4. Contractor shall be responsible for providing the USPTO with an official weekly status of all assigned orders.
 - 2.12.5. Contractor shall be responsible for performing a monthly reconciliation of all Computer Replacement Program Delivery Orders to ensure 100% accuracy at all times.
- 2.13. **Handheld and Radio Data Processing:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:
- 2.13.1. Contractor shall be responsible for processing handheld and radio transactions on a daily basis. All unprocessed transactions must be brought to the designated Technician's attention within 2 hours of processing for reconciliation.

- 2.13.2. Contractor shall be responsible for ensuring all handheld and radio equipment have the current data tables installed on the units at least once a week.
- 2.13.3. Contractor shall be responsible for establishing an electronic storage mechanism to maintain all processed and unprocessed transactions in raw form.
- 2.14. **Standard and Custom Reports:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:
 - 2.14.1. Contractor shall be responsible for maintaining all Asset Management reports available to the contractor at conception of the project.
 - 2.14.2. Contractor shall be responsible for maintaining the Asset Management Report library on as required basis.
 - 2.14.3. Contractor shall be responsible for creating new reports within four hours after request by the USPTO's designated COTR/Task Manager. In addition, all requests received by another USPTO employee or USPTO authorized contractor will require the designated COTR/Task Manager's approval before execution.
 - 2.14.4. Contractor shall be responsible for bringing all report discrepancies or opportunities for improvement to the USPTO's designated COTR/Task Manager's attention.
- 2.15. **Training and Documentation:** The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:
 - 2.15.1. Contractor shall be responsible for developing all training documentation and classes to support all Asset Management functions to the Inventory Support Team and Technicians utilizing the Handheld/Radio units.
 - 2.15.2. Contractor shall be responsible for providing training to all new employees and refresher training to existing employees to ensure 100% compliance and accuracy of the Asset Management activities at all times.
- 2.16. **Asset Management:** The Contractor shall review daily reports on asset management activities (deployments, excess, moves, etc.) to ensure the proper use of the inventory system. Any discrepancies must be corrected with three (3) business days.
 - 2.16.1. The contractor shall use the mobile handheld units to record all hardware changes for asset management purposes and to document all field service work performed.
 - 2.16.2. The contractor shall perform an informal inventory certification once a quarter.

- 2.16.3. The contractor shall support the government in a formal certification as requested.
- 2.16.4. The contractor shall follow ISO certified procedures for all aspects of the warehouse operations.

2.17. **Financial Management:** The Contractor shall serve as Financial Management subject area expert with emphasis in the purchasing chain for Momentum Financials and the implementation of the Acquisitions subsystem in the Momentum Financials 6x upgrade effort. In support of the Acquisition subsystem, emphasis will also include the FedBizOps (FBO), FPDS-NG, and Vender Self Service (VSS) integrations and the conversion of data from the current automated Procurement system, Procurement Desktop (PD), to Momentum Acquisitions. All deliverables and testing activities will be assigned in writing (email) by the Director of the Financial Systems Division, the Implementation Project Lead or their designee. All hardware, software and office space required under this portion of the task order will be provided by the USPTO. The period of performance for this section is February 7, 2005 through June 30, 2005.

- 2.17.1. The contractor shall review and comment on functional deliverables in support of implementing the Acquisition subsystem to include FBO, FPDS-NG, VSS and PD conversion.
- 2.17.2. The contractor shall conduct system testing in support of the Momentum Financials upgrade to version 6.x.
- 2.17.3. The contractor shall attend meetings, including weekly status meetings with Director of the Financial Systems Division, the Implementation Project Lead or their designee, in support of assigned functional deliverables and system testing activities.
- 2.17.4. The contractor shall provide a Monthly Status Report with the following:
- Hours/days worked during the designated month.
 - Deliverables assigned and hours worked on each.
 - Status of assignments assigned during the designated month.

3. GOVERNMENT FURNISHED MATERIAL

The Government shall furnish all equipment identified below:

- Handheld Units and accessories
- Two Computer workstations for the processing of Handheld transactions
- One high-speed printers

In addition to equipment, the Government will furnish all paper requirements to support the printing of Property Custodian reports. Request for paper should be directed to the designated COTR/Task Manager.

4. LEVEL OF EFFORT

No work outside the scope of this Task Order will be performed without the written direction of the COTR. The Government reserves the right to de-scope this Task Order at any time.

5. PLACE OF PERFORMANCE

Work shall be performed throughout the various buildings occupied by the USPTO in Carlyle, VA; Crystal City, VA; Springfield, VA; and Bailey's Crossroads, VA and in the contractor-leased facilities in Crystal City, VA; Alexandria, VA; and Horsham, PA.

6. SCHEDULE OF DELIVERABLES

Deliverable	Delivered To	Frequency
Discrepancy Listings 1. Unprocessed Transactions 2. Mis-scan Transactions	COTR/Task Manager or designee	Daily
Data Quality Reports	COTR/Task Manager or designee	Weekly
Financial Reconciliation Report	COTR/Task Manager or designee	Weekly
Property Custodian Reports	PAO/PC/Organization Reps	Monthly and as requested
Property Custodian Listing	COTR/Task Manager or designee	Monthly and as requested
Property Custodian Certification Reports	PAO/PC/Organization Reps	Quarterly
CTI Analysis	COTR/Task Manager or designee	Monthly
Verification Statistics of Quality Assurance efforts	COTR/Task Manager or designee	Monthly
Adhoc Asset Reports	COTR/Task Manager or designee	As Required
Statistic and Detail Reports for Monthly and Quarterly Certification Reports (see 2.1.4)	COTR/Task Manager or designee	Request + 4hrs
Surplus Reports	COTR/Task Manager or designee	As Required

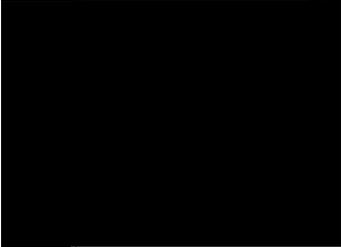
7. APPLICATION FOR INFORMATION SYSTEMS LIFE CYCLE MANAGEMENT (AIS-LCM)

AIS-LCM is required under this task.

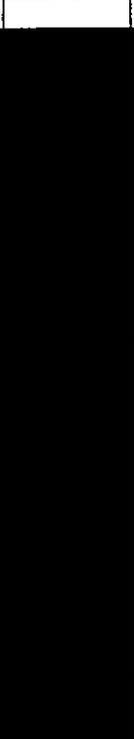
8. TRAWICK RESPONSE

TO-11, July 1, 2005 – June 30, 2006 – Statement of Work for the Inventory Support Task on the FMEUS 2 contract

TRAWICK proposes to perform the work specified in the Statement of Work for the period July 1, 2005 – June 30, 2006 with the following staffing level:

Labor Category	Quantity
	
Total Core Staff	

The following table represents the functional responsibilities, staffing levels, labor categories selected to perform the work specified in the Statement of Work.

RESPONSIBILITIES MATRIX			
Function	Labor Category	Qty	Duties and Responsibilities
Manager			Provides management oversight, coordination, process and inventory support to include Asset Management, Inventory Support and Warehouse Operations. TRAWICK believes it is necessary to have a senior level manager to provide direct management oversight and technical guidance for these diverse but connected tasks. Interacts with PAO's and PC's to resolve problems and answer questions.
Team Lead			Provides technical management oversight and technical guidance for the Data Entry, Auditor Financial Reconciliation segments of the task. Create, Issue and account for all Non-DOC barcode Labels. Develop, maintain and issue tracking documentation that reflects statistics in support of the Fiscal Year Asset Management guidelines and schedule of activities. In concert with PAO's and PC's resolve problems and answer questions.
Data Entry/Fld Tech			Provide data entry and field support for all areas of the Inventory support task. Monitors Dolphin

RESPONSIBILITIES MATRIX			
Function	Labor Category	Office	Duties and Responsibilities
			usage, downloads and uploads for asset integrity. Field work involves on-site report verification, scanning of workstations, replacement of CFG and CD labels as needed for inventory accuracy. Does Quality data reports and verifications. Handles distribution of all reports.
Auditor/Field Tech			Preparation of reports and report packages. Perform daily asset reconciliation. Perform quality assurance verification on units identified on a quarterly and annual basis. Maintain verification stats. Perform weekly data quality checks to ensure asset data quality. Manage and account for all DOC provided barcode labels.
Finance/Audit Tech			Provide updates to the Asset Mgmt Sys for all assets in the surplus-excess process, and prepare official surplus reports upon request. Provide management oversight for all archiving activity. Perform financial reconciliation activities and prepare reports.
Trainer/Crystal Rpts			Maintain all Asset Mgmt reports and Report Library. Create new reports using the Report Writer system identified by the PTO. Develop and maintain training classes for Asset Mgmt functions and handheld/radio units. Provide initial and refresher training for new and existing staff in Asset Mgmt and handheld/radio unit use.
Asset Manager			The Contractor shall review daily reports on asset management activities (deployments, excess, moves, etc.) to ensure the proper use of the inventory system. Any discrepancies must be corrected with three (3) business days.
Asset audit/ Verification			On-campus support for verifying and auditing daily transactions in EAMS and RADAR. Follow up on all daily transactional discrepancies, at times re-scanning (on site).

EXEMPTION 4 (FOIA)
5 USC Sec. 552(b)(4)

- B. Resource Summary.** The following table provides a high level summary of all labor hours, labor costs and ODC costs for the period July 1, 2005 – June 30, 2006.

	Hours	Cost
Labor		
ODCs		
TOTAL		

- B. Resources by labor category.** The following table provides a detailed breakdown of labor hours and costs per labor category for the period July 1, 2005 – June 30, 2006.

Labor Category	Comments	Qty	Hour	Rate	Cost
TOTAL					

There is no funding in this work plan for support of Section 2.17 (Financial Support).

EXEMPTION 4 (FOIA)
5 USC Sec. 552(b)(4)

AMENDMENT OF SOLICITATION/MODIFICATION OF CONTRACT

1. CONTRACT ID CODE

Page
1 of 3

2. AMENDMENT/MODIFICATION NO. 0007
 3. EFFECTIVE DATE 09/16/2005
 4. REQUISITION/PURCHASE REQ. NO. See Funding Detail
 5. PROJECT NO. (if applicable)

6. ISSUED BY CODE 1
 Office of Procurement
 US Patent and Trademark Office, PO Box 1450-Mail Stop 6,600 Dulany
 St., MDE, 7th Floor
 ALEXANDRIA, VA 22313-1450

7. ADMINISTERED BY (if other than Item 6) CODE

8. NAME AND ADDRESS OF CONTRACTOR (No., street, county, State and Zip Code)
 Carol Trawick
 Trawick and Associates
 6900 Wisconsin Avenue, Suite 400
 Bethesda, MD 20815

9A. AMENDMENT OF SOLICITATION NO.

9B. DATED (SEE ITEM 11)

(X) 10A. MODIFICATION OF CONTRACT/ORDER NO.
50PAPT201025 / 56PAPT205061

(X) 10B. DATED (SEE ITEM 13)
09/23/2002

CODE * FACILITY CODE

11. THIS ITEM ONLY APPLIES TO AMENDMENTS OF SOLICITATIONS

The above numbered solicitation is amended as set forth in Item 14. The hour and date specified for receipt of Offers is extended, is not extended.

Offers must acknowledge receipt of this amendment prior to the hour and date specified in the solicitation or as amended, by one of the following methods:

(a) By completing Items 8 and 15, and returning _____ copies of the amendment; (b) By acknowledging receipt of this amendment on each copy of the offer submitted; or (c) By separate letter or telegram which includes a reference to the solicitation and amendment numbers. FAILURE OF YOUR ACKNOWLEDGMENT TO BE RECEIVED AT THE PLACE DESIGNATED FOR THE RECEIPT OF OFFERS PRIOR TO THE HOUR AND DATE SPECIFIED MAY RESULT IN REJECTION OF YOUR OFFER. If by virtue of this amendment you desire to change an offer already submitted, such change may be made by telegram or letter, provided each telegram or letter makes reference to the solicitation and this amendment, and is received prior to the opening hour and date specified.

12. ACCOUNTING AND APPROPRIATION DATA (if required)

See Funding Detail

**13. THIS ITEM ONLY APPLIES TO MODIFICATION OF CONTRACTS/ORDERS.
IT MODIFIES THE CONTRACT/ORDER NO. AS DESCRIBED IN ITEM 14.**

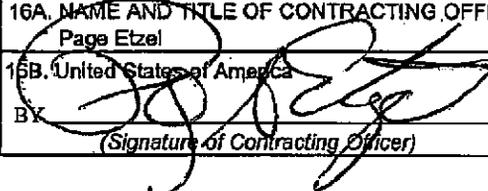
CHECK ONE	A. THIS CHANGE ORDER IS ISSUED PURSUANT TO: (Specify authority) THE CHANGES SET FORTH IN ITEM 14 ARE MADE IN THE CONTRACT ORDER NO. IN ITEM 10A.
<input type="checkbox"/>	
<input type="checkbox"/>	B. THE ABOVE NUMBERED CONTRACT/ORDER IS MODIFIED TO REFLECT THE ADMINISTRATIVE CHANGES (such as changes in paying office, appropriation date, etc.) SET FORTH IN ITEM 14, PURSUANT TO THE AUTHORITY OF FAR 43.103(b).
<input type="checkbox"/>	C. THIS SUPPLEMENTAL AGREEMENT IS ENTERED INTO PURSUANT TO AUTHORITY OF:
<input checked="" type="checkbox"/>	D. OTHER (Specify type of modification and authority) The Task Order Clause of the Contract.

E. IMPORTANT: Contractor is not, is required to sign this document and return _____ copies to the issuing office.

14. DESCRIPTION OF AMENDMENT/MODIFICATION (Organized by UCF section headings, including solicitation/contract subject matter where feasible.)

The purpose of this modification, MO07, to delivery order 56-PAPT-2-05061, is to provide additional funding. See attached details.

Except as provided herein, all terms and conditions of the document referenced in Item 9A or 10A, as heretofore changed, remains unchanged and in full force and effect.

15A. NAME AND TITLE OF SIGNER (Type or print)	16A. NAME AND TITLE OF CONTRACTING OFFICER (Type or print) Page Etzel
15B. CONTRACTOR/OFFEROR	15B. United States of America
(Signature of person authorized to sign)	BY  (Signature of Contracting Officer)
15C. DATE SIGNED	16C. DATE SIGNED 9/16/05

Line Item Summary	Document Number 56PAPT205061/0007	Title Inventory Support TO-11 MO07	Page 2 of 3
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FYs **Fund** **Budget Org** **Sub** **Object Class** **Sub** **Program** **Cost Org** **Sub** **Proj/Job No.** **Sub** **Reporting Category**
Division **Closed FYs** **Cancelled Fund**

Line Item Number	Description	Delivery Date (Start date to End date)	Quantity	Unit of Issue	Unit Price	Total Cost
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This is Task Order 56-PAPT-2-05061/0007 to Contract No. 50-PAPT-2-01025 for the Inventory Support Task Order TO-11. The period of performance is July 1, 2005 through June 30, 2006.

No Changed Line Item Fields

Previous Total: \$2,625,789.29
Modification Total: \$200,000.00
Grand Total: \$2,825,789.29

Procurement P.O.C. Joe Troia at (571) 272-8407. COTR, Jack Bowles at (703) 305-8823. Contractor P.O.C. [REDACTED]

EXEMPTION 4 (FOIA)
 5 USC Sec. 552(b)(4)

**Contract Level
Funding Summary**

Document Number
56PAPT205061/0007

Title
Inventory Support TO-11 MO07

Page
3 of 3

Funding Strip Code

2005 - - A - 188270 - - 2570 - - 010304 - 188270 - - - - NONCOMP - - - -

Change in Funded Amount

\$100,000.00

Reference Requisition: 189P0530625

2005 - - A - 291100 - - 2570 - - MZAMC1 - 291210 - - - - NONCOMP - - - -

\$100,000.00

Reference Requisition: 291P0530626

INVENTORY SUPPORT TEAM
TASK ORDER TO-11/MO07

CONTRACT NO.: 50-PAPT-2-01025 ORDER NO.: 56-PAPT-2-05061/0007
EFFECTIVE DATE: September 16, 2005
REQUISITION NO.: 188P0530625, 291P0530626

ISSUED BY: U.S. PATENT AND TRADEMARK OFFICE
OFFICE OF PROCUREMENT
600 DULANY ST, MDE 7D44
ALEXANDRIA, VA 22313-1450

ISSUED TO: TRAWICK AND ASSOCIATES
6900 WISCONSON AVENUE
SUITE 400
BETHESDA, MD 20815

ACCOUNTING AND APPROPRIATION DATA:
188P0530625 2005 A 188270 2570 010304 188270 OBLIGATE: \$100,000.00
291P0530626 2005 A 291100 2570 MZAMCI 291210 OBLIGATE: \$100,000.00
TOTAL OBLIGATION: \$200,000.00

REVISION 1, TO-11, July 1, 2005 – June 30, 2006 – Statement of Work for the Inventory Support Task – FMEUS2 contract:

	Hours	Cost
Labor		
ODCs		
TOTAL		

EXEMPTION 4 (FOIA)
5 USC Sec. 552(b)(4)

Office of the Chief Information Officer FMEUS2 Statement of Work		
COTR	Task Title	Task Manager
Jack Bowles 571-272-5407 Tom King 571-272-5419	Inventory Support Team	Tom King 571-272-5419

1. BACKGROUND

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On an annual basis, the Department of Commerce's Office of the Inspector General (OIG) performs a testing of the USPTO's accountable asset management system. Over

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The support required under this task order, in conjunction with the scanning performed under other task orders, is an integral part of the USPTO's accountable asset management system.

2. STATEMENT OF WORK

- 2.1. Inventory Support:** The contractor shall be responsible for the project management, oversight coordination, process and inventory support for the following activities:
- 2.1.1.** Contractor shall be responsible for the execution of the Fiscal Year Asset Management guidelines and schedules of activities for all the organizations within the USPTO. The guidelines and schedules of activities will be determined by the USPTO's Asset Management Team and will be provided to the contractor – please refer to the CFO News/Asset Management folder for this fiscal year's documents. As changes are warranted, updates to these documents will be made by the Asset Management Team and will be subsequently posted to this folder.
 - 2.1.2.** Contractor shall be responsible for the preparation and distribution of monthly Property Custodian report packages to all Property Custodians and/or Property Accountability Officers in accordance with the monthly report schedule. Report packages will include a monthly report cover sheet, monthly Property Custodian Report, and Transaction Report(s).
 - 2.1.3.** Contractor shall be responsible for the preparation and distribution of the quarterly Property Custodian report packages to all Property Custodians and/or Property Accountability Officers in accordance with the quarterly report schedule. Report package will include a quarterly report cover sheet, Property Custodian Certification Report, and Transaction Report(s).
 - 2.1.4.** Contractor will be responsible for the development, maintenance and issuance of tracking documents to reflect statistics to support the Fiscal Year Asset Management guidelines and schedules of activities.
 - 2.1.5.** Contractor shall be responsible for coordination and inventory support with asset movement and changes in Property Custodian assignment of responsibilities.
 - 2.1.6.** Contractor shall be responsible for interacting with the designated Property Accountability Officers, Property Custodians, and designated point of contacts to answer their questions, and resolve inventory questions and discrepancies.
 - 2.1.7.** Contractor shall be responsible for reviewing and coding of Property Custodian reports to ensure all updates are made correctly and within the required timeframes. Processing of these reports should be made with 95% accuracy and within 48 hours of receipt.

- 2.1.8. Contractor will be responsible for managing and accounting for all Department of Commerce provided bar code labels (i.e., CD bar code labels).
- 2.1.9. Contractor will be responsible for the creation and issuance of all non-Department of Commerce provided bar code labels (e.g., CFG, CFGH, CFGT, etc.)
- 2.1.10. Contractor will be responsible for daily reconciliation of the "To Be Assigned" Property Custodian listing. Reconciliation should ensure that all assets are properly assigned to the designated Property Custodian, User, CFG, and location with 95% accuracy and within 48 hours.
- 2.1.11. Contractor shall be responsible for updates to the official Asset Management system based on submitted asset management related forms to include the "Agreement/Authorization for Home Use of Assets" and "Transfer of Assets".
- 2.1.12. Contractor shall be responsible for establishing a process to ensure that all equipment certified for Home Use is re-verified 30 days prior to the 'estimated return date.'

2.2. Category, Type, Item (CTI) Maintenance: The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

- 2.2.1. Contractor shall be responsible for maintaining the current Category, Type, Item listing to include:
 - 2.2.1.1. Adding new asset descriptions as they are received for the 1st time at the USPTO (e.g., at the central warehouse, on-site of USPTO Campus, etc.).
 - 2.2.1.2. Consolidation of existing CTI as determined/approved by the USPTO
 - 2.2.1.3. Inactivating/Archiving existing CTI as determined/approved by the USPTO
 - 2.2.1.4. Standardization of asset descriptions for existing and newly acquired assets.
 - 2.2.1.5. As an initial effort, the contractor shall be responsible for performing a complete and thorough analysis of the existing CTI and identifying areas of improvement to the USPTO. All changes approved by the USPTO will be the contractor's responsibility to effect changes in the official Asset Management system. In addition, it's the USPTO's belief that this effort can be separated into two distinct efforts: (1) Consolidation of existing Item descriptions for like items and to correct known typographical errors; and (2) Thorough analysis of remaining CTI to include physical observation of assets to determine 'true' CTI of selected asset(s) before implementing changes. Of the USPTO's top priorities are the Item

descriptions for the Types of Servers, CPUs, Monitors and Printers.

2.3. *Property Custodian Administration:* The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.3.1. Contractor shall be responsible for maintaining the current Official Property Custodian Listing to include:

2.3.1.1. Adding all newly designated Property Custodians.

2.3.1.2. Updating existing Property Custodians to reflect any change of information (e.g., Office Title, Property Accountability Officer, etc.)

2.3.1.3. Realigning Property Custodians and their associated assets as requested.

2.3.1.4. On a monthly basis, the contractor shall issue the Official Property Custodian Listing to all Organization Representatives on the Asset Management Team. This listing should be issued at the commencement of each month and coincide with the distribution of the monthly Property Custodian reports – to ensure 100% accuracy between the two.

2.4. *Surplus/Excess Maintenance:* The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.4.1. Contractor shall be responsible for all updates to the official Asset Management system for all assets in the surplus-excess process.

2.4.2. Contractor shall be responsible for preparing official surplus reports at the direction of the USPTO's designated COTR/Task Manager.

2.5. *Computer Replacement Program (CRP) Maintenance:* The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.5.1. Contractor shall be responsible for all updates to the CRP code in the official Asset Management system for each designated Computer Processing Unit (CPU).

2.6. *Menu Configuration:* The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.6.1. Contractor shall be responsible for the maintenance of all Asset-related data fields that have drop-down menus in the Menu Configuration of the

Asset Console. Maintenance will include additions, changes, and inactivating values that are no longer in use.

2.7. *Archive Administration:* The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.7.1. Contractor shall be responsible for archiving CFGs, CDs, and CTIs at the direction of the USPTO. Archiving will be executed in the Asset Console and in accordance with established business rules.

2.8. *EAMS User:* The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.8.1. Contractor shall be responsible for the maintenance of all new users (Users are either USPTO employees or designated contractor staff) being assigned assets at the USPTO. Maintenance will include additions, changes, and inactivating users that are no longer either at the USPTO or doing business with the USPTO.

2.9. *Technician Administration:* The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.9.1. Contractor shall be responsible for the maintenance of all new Technician (Tech) IDs (Tech IDs are issued for both USPTO employees and contractor staff) for those technicians who scan assets as part of their normal responsibilities at the USPTO. Maintenance will include additions, changes, and inactivating Tech IDs for technicians that are no longer either at the USPTO or doing business with the USPTO.

2.10. *Quality Assurance:* The contractor shall provide the project management, oversight coordination, process and inventory support for the following activities:

2.10.1. Contractor shall be responsible for performing quality assurance verification on each of the designated Property Custodians on an annual basis.

2.10.2. Verifications shall consist of physically observing and validating 10% of the assets on the custodian's current Property Custodian report and 10% of the assets found in the custodian's area to their current Property Custodian report.

2.10.3. Verifications should be performed in a month other than the Property Custodian's designated required Certification submission.

2.10.4. All verification efforts must be clearly documented for each Property Custodian and changes made to the system when deemed necessary.